# Online Scheduling: A Practice Management Boost

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Staffing has always been a challenge for medical practices, so practice management solutions that can convert manual work to automated are always welcome. Building an online scheduling platform for patients to self-serve may offer this opportunity but only if it is executed effectively. Consider these tactics to create a successful framework for your practice's online scheduling offering.

*Prioritize real-time access*. Your scheduling system is dynamic; at any moment in time, an appointment slot can fill – or open. Based on data from more than 100 health systems, nearly 40% of slots that are booked don't end up with the originally scheduled patient in them. That's no surprise, given the pace of our lives today. The fluidity of our schedule, therefore, necessitates that all booking operations must fire on a real-time basis. If a patient schedules an appointment by speaking with a staff member, that slot must be released from the inventory immediately. Your online scheduling system must function similarly; if it must be later worked by a person, it won't be as successful.

*Watch the cancellations*. Research has shown that cancellations rise with online scheduling. It's no wonder given consumers' 24/7 access to the scheduling platform. Consider that online scheduling is open for business 168 hours each week, compared to the roughly 45 business hours that your practice's phones are normally open. Cancellations must be immediately recognized in your system so that they can be converted to open slots. Consider integrating your online scheduling system with an automated waitlist, so that slot conversions can occur without friction. Although cancellations may rise with online scheduling, it's worth noting that research has proven that no-shows are lower.

*Create a confirmation process*. Appointment reminders improve patients' attendance, thereby reducing no-shows. Send out reminders for all appointment bookings, including self-scheduling. Because online scheduling often includes near-term appointments (e.g., the next day), consider confirming the appointment via a secure texting program as soon as the booking is complete. Then, move the confirmations into your "normal" workflow for appointment reminders, which is often three to five days out, and then the day before and/or morning of an appointment.

*Untether the function*. Many online scheduling solutions reside within the patient portal. Therefore, the option is limited to not only existing patients, but exclusively to those patients who have adopted the portal. Portal messages have risen substantially since the pandemic, adding to provider burnout. If your online scheduling system is tethered to your portal (e.g., "is this patient appropriate to schedule?"), you may be perpetuating the burnout problem. Furthermore, offering the solution outside of your portal opens the door to new patients – and may give you flexibility to extend the solution in a different language (if available from the vendor), as most portals are available only in the English language. Best practice is to have the function available to patients both inside *and* outside of the portal.

*Open the offering*. Consider which appointment slots you will offer via online scheduling: all new patients? Established patients for new problems or just existing ones? Etc. The more branches of the decision tree you create, however, the more "mistakes" will be made. You may have an idea of who constitutes the "right" patient for your practice, however, identifying the "right" patient may lead you on an elusive journey. Constructing a 53-point questionnaire for a patient who simply doesn't feel well will only frustrate the patient (yes, I have actually seen a 53-question self-scheduling system!) – and ultimately, make your system unusable. Consider opening your offering widely, and then establish a brief triage or screening process to scrub the schedule two or three days out, if needed. Although you may have a few online-scheduling snafus, most consumers aren't trolling for random doctors' appointments needlessly. If you're really concerned about opening the inflow, limit your self-scheduling to controlled "offers." For example, send reservations with links to your self-scheduling system to established patients due for their follow-up visits, annual appointments, screening tests, and so forth. Be sure to work with your practice's attorney on messaging about emergency situations.

*Market it*. Review the opportunity to notify patients of the online scheduling solution. Train providers and staff to encourage patients to use it, add the function to your on-hold phone messaging, and make it prominent on your website to attract new patients.

Although online scheduling may offer some challenges for practices to deploy, it's increasingly becoming a necessity in the market. Convenience is the name of the game, and consumers are demanding it from the health care industry. Like many consumer-based offerings, once it becomes readily available in the market, we begin to assume that it exists. We check-in online for our flight, we use Venmo to pay our babysitter, we go online to buy a household product to be delivered to our doorstep, and we pump our own gas. Self-service is woven into our lives as consumers. Online scheduling no longer offers a competitive advantage; the solution is on the verge of becoming an expectation for medical practices. It's an opportune time to create or refine the blueprint for success for your practice.

Tips for Monitoring your Online Scheduling Solution

Consider these reports for your practice's online scheduling platform:

- Establish a process to identify and monitor where patients fall off the system (that is, when they are making an online appointment), and then discontinue the process. Work with your vendor to provide a weekly report for you.
- Create a report of the timing of self-scheduled appointments, when are patients using the system? This may help detractors if they see that patients are booking appointments at all hours of the day, particularly outside of business hours.
- Add a disposition section to your online scheduling system to monitor cancellations; if a patient cancels, prompt them to select a reason from a pre-set menu to explain their choice. Monitor these reasons for cancellations to determine opportunities, e.g., many patients canceling their appointment due to insurance acceptance may prompt you to review your lack of participation with that health plan.
- Report on the volume of appointments booked online and monitor efficacy: how many appointments were booked online and did those patients arrive in the booked slots?  If not, why not?  Measure slots that go unfilled (which may occur if they are cancelled at the last minute) and no-shows. Compare these outcomes to staff-generated bookings.

- Measure cancellations – and the portion of canceled slots that are subsequently filled. This “cancellation conversion rate” should be 100% or as close as possible.
- Monitor the portion of your total appointment bookings that occur online, as compared to your schedulers and other staff (e.g., surgery schedulers who may book post-ops and staff at check-out who may book follow-up appointments).
- Track new patients who book online and keep their appointment. Report on their demographics (e.g., age, gender, and geographical location). These insights may guide your marketing efforts.

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