



COOPERATIVE OF
AMERICAN PHYSICIANS

THE PHYSICIAN'S ACTION GUIDE TO AN OUTSTANDING **PATIENT EXPERIENCE**



Table of Contents

- 1 Introduction
- 2 Why Patient Experience?
- 3 What is The Patient Experience?
- 4 What are the Key Elements of a Successful Patient Experience Initiative?
 - Culture
 - Communications
 - Staff
 - Systems and Processes
 - Technology
- 10 Summary and Checklists
- 15 Conclusion
- 16 About CAP



Introduction

Too often, discussions about patient experience seem to be about things that are obvious (“Yes, of course we should be polite to patients”) or unimportant (“Should coffee be available for patients in the waiting room?”). This is not that kind of guide.

This guide is about optimizing the fundamentals of your medical practice so patients feel cared for, fully prepared to comply with your course of treatment, and completely positive about your expertise and the ability of your staff.

It’s about building a practice that patients are happy to recommend to friends.

It’s about building a reputation you and your team can be proud of.

It’s about being your best every day, and being recognized for it.

This booklet is a practical guide to patient experience, with concrete steps you can make to coach your staff and lead by example. We also encourage you to read – and use – the Summary and Checklist at the end of this guide.

Improving takes work and personal commitment. But the better the patient experience is, the more rewarding and enjoyable your practice will be.

Why Patient Experience?

There are many reasons why patient experience has taken on increased importance.

First, out-of-pocket healthcare expenses continue to rise. So naturally, patients and their families expect more. Imagine being deeply concerned about your health, and waiting for what seems like an eternity for someone to acknowledge you at the front desk. “For all this is costing me,” you can imagine that patient thinking, “is it too much to ask for someone to look me in the eye and tell me they know I’m here, and will help me shortly?”

Second, the world has changed. We pull a smartphone out of our pocket, expecting we can buy anything we can imagine. What’s more, we expect our purchases to arrive at our doorsteps overnight – or even the same day – and for shipping to cost us nothing.

Third, as a practical matter, a poor patient experience is fraught with problems. Dissatisfied patients can create extra work for the office staff, along with the unpleasantness of making the patient and family go through things twice. Value-based compensation will reward you for achieving certain quality objectives – and penalize you for not achieving them. Unhappy patients harm professional relationships (who wants to refer a patient and have them come back saying “That doctor was awful”?) Angry, litigious patients impact liability exposure.

But the most important reason patient experience matters is because patients and their families are suffering.

John Banja of the Emory Center for Ethics¹ has spoken about how patients, family, and the physician all meet at an intersection of suffering. The patient and family may be stressed and confused, too slow to understand, or too quick to nod and agree when they do not.

The most fundamental job of the physician is to keep patients safe, to make sure everyone involved knows that the physician – and everyone in the practice – genuinely cares about returning the patient to the best possible health.

Some physicians might assume that everybody knows how deeply they care, and that the only thing a patient cares about is getting better.

In reality, a patient’s opinion is not formed by one thing.

It’s informed by **everything**, from the moment a patient first contacts you to the moment they choose – or do not choose – to recommend you.

¹ http://ethics.emory.edu/people/Faculty/John_Banja.html

What is The Patient Experience?

Every interaction with a physician's practice communicates something that contributes to the patient's overall experience:



The patient's first call to the office



How the patient is greeted when arriving for his or her first visit



The cleanliness of the office



The seating area (is there enough room for everyone? Is the furniture in disarray?)



How the patient is treated by staff



How delays or unexpected circumstances are explained



How the patient is treated by the doctor (does he or she look the patient in the eye?)

No wonder the Beryl Institute defines patient experience as

“ the sum of all interactions, shaped by an organization's culture, that influence patient perceptions across the continuum of care.”

It's everyday, easily overlooked details that combine to boost a patient's confidence in your practice or diminish it. As Sue Ter Maat memorably put it,

“ The patient experience – focusing on care coordination, communication with caregivers and staff responsiveness – is about protocols designed to reduce patient stress.”²

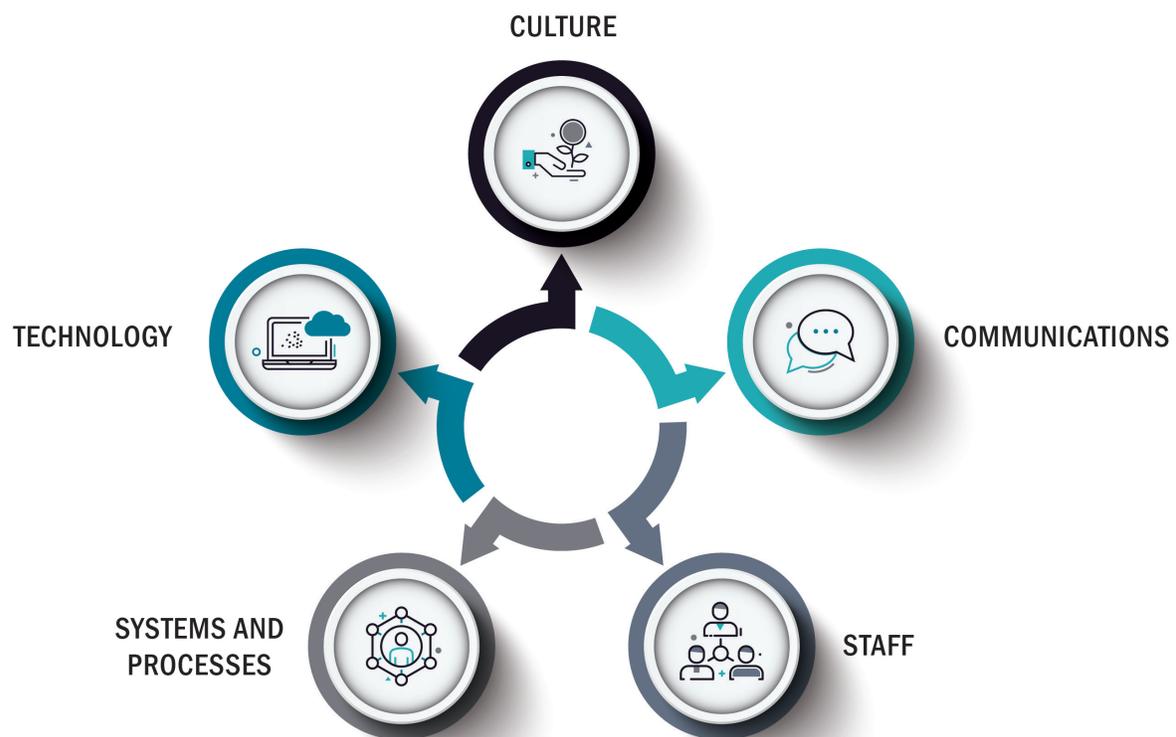
We know a spinal surgeon who works in a poor neighborhood. His practice is in an old, poorly-maintained building. Parking is difficult. The elevator is in bad condition. The ride up to his office is uninspiring, to say the least. But the moment you get off the elevator, the communication changes. There is a seat for everyone. Reception is in a long open area. There is someone to greet every person who walks in. The examining room is immaculate. His patients and their families trust and admire him. A fancy office doesn't mean a better patient experience. What you communicate is what matters.

² <https://www.capphysicians.com/business-case-for-creating-extraordinary-patient-experience>

What Are The Key Elements of a Successful Patient Experience Initiative?

Since all elements of care can impact the patient experience, it can appear overwhelming or impossible to narrow down the most important elements. Efforts to improve everything at once are unlikely to succeed.

Instead, we encourage you to think of improvement as having five key elements.



No practice sets out to provide a poor patient experience. Everyone wants their patients to be happy and healthy, and most staff sincerely believe they are already doing all they can.

One of the most important ways you can improve patient safety and reduce errors is to create a culture of safety where everyone is treated with respect and the focus is on teamwork and communication. The ultimate goal is that staff will feel comfortable verbalizing issues related to patient safety.

But first, what is culture? Investopedia defines it as

“ The beliefs and behaviors that determine how a company’s employees and management interact (...) Often, corporate culture is implied, not expressly defined, and develops organically over time from the cumulative traits of the people the company hires. A company’s culture will be reflected in its dress code, business hours, office setup, employee benefits, turnover, hiring decisions, treatment of clients, client satisfaction and every other aspect of operations.”³

If the leaders and staff of a practice believe – consciously or not – that the needs of the practice come first, that what is easier for the physician is what’s best for the patient, and that patients and caregivers are difficult and uncooperative, the patient experience will invariably suffer.

However, if the leaders and staff genuinely believe that the needs of patients come first, that service is a way to demonstrate care, and that patients and caregivers need an environment that is calm and efficient, the patient experience will be positive.

As Amazon.com CEO Jeff Bezos memorably put it in his 2018 investor letter,

“ One thing I love about customers is that they are divinely discontent. Their expectations are never static – they go up. (But) how do you stay ahead of ever-rising customer expectations? There’s no single way to do it – it’s a combination of many things. But high standards (widely deployed and at all levels of detail) are certainly a big part of it.”⁴

Respondents in the 2017 HealthLeaders Media survey, *Enhancing Patient Experience Through Process Improvement Methodologies*, for example, cite that difficulty changing organizational culture (31%) is the biggest stumbling block to creating an effective patient experience program at their organizations.⁵

Improving patient experience simply isn’t possible without real efforts to improve the culture of the practice. Three keys to consider:

Senior leadership has to model the behaviors they want to see in their staff.

Staff must understand why change is necessary, and buy in to the work required to execute it.

Training and tools – such as scripts, defined processes, and standardized best practice – must be provided.

Without these, culture change exercises typically fizzle quickly.

Building a practice with open communication, strong teamwork, and clear protocols requires patience and commitment. But building a great environment is rewarding for everyone – not least of which is you, as the business owner.

³ <https://www.investopedia.com/terms/c/corporate-culture.asp>

⁴ <https://www.sec.gov/Archives/edgar/data/1018724/000119312518121161/d456916dex991.htm>

⁵ <http://www.healthleadersmedia.com/report/intelligence/enhancing-patient-experience-through-process-improvement-methodologies>



Communications

Communications that are unclear, incomplete, or inappropriate cause stress that leads to a poor patient experience.

- Do staff members greet and introduce themselves, including their positions, to patients/visitors from check-in through check-out?
- Does your staff provide courteous, clear, and understandable instructions and solicit feedback from patients?
- Do staff members keep track of arrival and departure times so patients waiting more than 15 minutes receive an explanation?
- Are staff provided with or required to wear professional attire in the practice, including nametags with their name and position/title?
- Do staff members assist and accompany very young, old, or disabled patients?
- Do you provide patient education, and explain how to get more information?
- Are staff members educated in handling patient complaints to promote positive relationships?
- Are patients' health concerns treated seriously and with empathy?
- Does your staff follow up to ensure that emails to patients have been received and understood, especially regarding lab work?
- Are modesty and patient privacy respected by closing the examination room door, and is a chaperone present?

Are clear instructions regarding emergencies provided by your answering system? Also, remember that how your staff conducts themselves needs to always communicate professionalism.

- Are staff members trained in customer service?
- Have staff members been trained to reserve eating and personal conversations to non patient areas only?

Good communication is core to both the patient experience and to safety. Failures in communication are the leading cause of all adverse events that cause harm to a patient.



Only 12 percent of the U.S. population can adequately read healthcare information and understand it.⁶

⁶ <https://health.gov/communication/literacy/quickguide/factsbasic.htm>



Staff

Patient experience has everything to do with feeling cared for, and care is fundamentally human. Your staff sets the tone. If your staff is calm, patient, kind, and organized, it immediately helps everyone to relax, and goes a long way to providing a good patient experience. However, if your staff is harried, abrupt, impatient, and clearly struggling to keep up, it will tend to make already worried patients feel worse.

Patients are people. Most will be relatively easy-going and compliant, but rest assured you will always serve some who are the opposite. Never assign the newest medical assistant to your most difficult patients. Instead, ask the new staff member to watch an experienced staffer who has learned how to handle complaints smoothly and compassionately.

Here are five keys to improving how your staff performs:

Lead by example, and model the behavior you want your staff to emulate.

Listen carefully, be engaged, be open to constructive feedback.

Hire carefully, and invest in training.

Ensure you are hiring the right people, for the right positions, with the right job descriptions.

Insist on courtesy, respect, and privacy for every patient.



Systems and Processes

Analysis is key: ongoing critical evaluation of facility, environmental, and support operations.

Map out and review the entire patient experience, from the time a patient first contacts your office through final billing. How does the work get done?

Then, meet with your staff to go over the stages of the patient experience together.

Ask for feedback:

- Are there parts of the patient experience map that are incomplete?
- Do formal processes exist, or does every employee informally do it his or her own way?

- Where would more formal processes help, and where would they not be useful?
- Identify areas where formal processes are essential: medication management, refill processes, and medication monitoring.
- What parts of the patient journey does the office staff do really well, and why?
- What parts are confusing for staff and/or patients?
- What parts make staff and/or patients angry or frustrated?
- What parts of the patient journey need improvement?
- Has anyone on the team been at another practice where things were done more smoothly?



Technology

Increasing efficiencies and reducing frustrations are critical to providing a satisfying patient experience. Existing and emerging technologies are bringing improved speed, accuracy, and efficiency to nearly every patient touch point.

For example, Customer Relationship Management (CRM) software can now enable staff to greet patients by name, remember birthdays and practice anniversaries (“Wow, I see you have been a patient with us for five years”), keep track of when certain patients prefer to make their appointments, and more.

In Electronic Medical Record (EMR) software, advances in voice dictation are making it easier to create unique patient records quickly. Some EMRs are leveraging artificial intelligence that learn the physician’s preferences, literally getting smarter the more they are used. Some allow you to log in with a tap.

Patient portals can streamline appointment scheduling, send texts to remind patients when to arrive, enable patients to securely view lab results and medical documents, renew prescriptions, and facilitate online billing. A better patient experience results in stronger loyalty: patients (who visit practices) with a portal are 13 times more likely to schedule a return visit.⁷

Digital patient consent forms, insurance verification, billing information, and e-signatures can all be accomplished on a tablet, helping to reduce errors caused by re-keying data. This can be a better experience for patients, too.

⁷ Source: Becker’s Hospital Review, “Patient Portal adoption increases collections, patient engagement: 3 things you need to know”

“ Patients, of course, find paperwork frustrating. Clipboards with multiple forms can be daunting and confusing, leaving patients uncertain about what information they need to fill out. That frustration mounts if patients are required to complete the same forms more than once to get the treatment they need. For example, they may be required to provide their medical history in several different departments or clinics within a large hospital.”⁸

Technology can be leveraged not only for patients and physicians, but for the benefit of caregivers. At Wake Forest Baptist Medical Center in North Carolina, arriving patients are given RTLS (Real-Time Location System) badges that automatically deliver the patient’s location into the EHR system. Rather than being confined to a waiting area for long periods, they can visit the cafeteria, take a walk, or relax in any way they choose. Important updates will be delivered by text message or phone calls, and the system allows for routine updates as the patient progresses toward check out.⁹

A True Story

Have you given clear instructions to caregivers? Does everyone really understand?

There was an 82-year-old woman with metastatic disease, on hospice care.

The family had access to the necessary pain medication.

Yet the woman was writhing in pain, needlessly.

Why? They misunderstood the doctor’s instructions.

The family thought they had to ask the doctor’s permission to ease her pain, so they didn’t give her the medications she needed.

Why? No one from the practice had ever checked back in with the family.

The lesson: don’t assume. Real care means caring enough to follow up.

⁸ Source: <https://www.beckershospitalreview.com/healthcare-information-technology/saying-goodbye-to-paper-the-ipad-advantage-for-healthcare.html>

⁹ Source: <http://www.infiniteleap.net/wp-content/uploads/2018/03/Case-Study-Enriching-Patient-and-Family-Experiences-by-Automating-Workflow-Processes-and-Communication.pdf>



Summary and Checklists

Three key things to remember:

1. A patient's opinion is not formed about one thing.
2. A patient creates an informed opinion by everything that is experienced.
3. Patients who feel they are treated professionally, with kindness and respect, are more likely to follow through with treatment plans and recommend the practice to others.

Patient experience is about managing the fundamentals so patients understand how deeply you care.

Three Critical Things to Get Right in Patient Experience

1 Good communication	2 Good follow-up	3 Good complaint management process
Between physicians and staff, between staff and patients, and between care providers.	Ensure that patients are always updated about lab results, and always know what the next steps are.	A good complaint management process helps ensure that negative comments stay between you and the patient, rather than being aired all over social media.

If you work hard at perfecting these things, you will have a better, richer, stronger, more caring practice.

Checklist: Creating a successful patient experience initiative

- Is your practice's culture – its behaviors and beliefs – patient-centric?
- Does your practice have defined guidelines about what you communicate and how that is accomplished?
- Does your practice have clear rules about how the staff engages with patients and caregivers?
- Does your practice have organized, codified systems and processes in place?
- Has your practice maximized the latest technologies to increase efficiency and reduce patient frustration?

Signs your patient experience initiative is not working

- Staff views it as “just more busy work”
- New behaviors don't last
- Patient complaint volume remains steady or increases

Checklist: Culture

- Is senior leadership modeling the behaviors they want to see in their staff?
- Does the staff understand why change is necessary? Do you have their buy-in to do the work required to execute the change?
- Have you provided enough training and tools?

Signs that your culture still needs improvement

- Your own behaviors haven't changed, or at least not consistently
 - The staff does exactly what you ask, but takes no further initiative
 - Training happened only once, and is not ongoing
-

Checklist: Communications

- Do staff members greet and introduce themselves, including their positions, to patients/visitors from check-in through check-out?
- Does your staff provide courteous, clear, and understandable instructions and solicit feedback from patients?
- Do staff members keep track of arrival and departure times so patients waiting more than 15 minutes receive an explanation?
- Do you provide patient education, and explain how to get more information?
- Are clear instructions regarding emergencies provided by your answering system?

Signs that your communications need improvement

- Confused patients
- Staff and patient frustration
- Long wait times for patients

Checklist: Improving How Your Staff Performs

- Are you leading by example, and modeling the behavior you want your staff to emulate?
- Are you listening carefully and staying engaged? Are you open to constructive feedback?
- Are you satisfied with your recent hiring choices? Have you provided new staff with proper training?
- Are you hiring the right people, for the right positions, with the right job descriptions?
- Are you insisting on courtesy, respect, and privacy for every patient?

Signs that your staff performance needs improvement

- Some hires do well, but others struggle or need to be replaced
 - Your staff avoids telling you bad news and doesn't make suggestions
 - Patients generally seem stressed when you see them
-

Checklist: Systems and Processes

- Have you mapped the patient experience at every touchpoint?
- Do formal processes exist? Does staff follow these?
- At minimum, do processes exist for essential functions such as medication management, refill processes, and monitoring?
- Does your staff constantly come to you for direction?
- Have you reviewed your systems and processes in the last 6 months?

Signs that your systems and processes need improvement

- Patients and staff are routinely unsure what to do next
- Re-work is the norm, not the exception
- New hires appear lost and are making things up as they go along

Checklist: Technology

- Have you performed a technology audit in the past year to look for areas for improvement?
- Have you asked your peers what technologies they are using, and what works best?
- Is your current technology serving as a way to enhance the patient's experience, or to avoid dealing with patients?

Signs that your technology needs improvement

- Patient loyalty is weak
- Patients and staff complain about the technology

As a physician, take time to:

- Know yourself, what matters to you, and how you want your life to be.
- Take care of yourself, and develop resilience.
- Know your practice, the environment, the community, and its resources.
- Seek out mentors and colleagues.
- Invest in staff; find and keep the right staff for your practice.
- Make use of professional resources in practice management.

Conclusion

Patients who feel they are treated professionally, with kindness and respect, are more likely to follow through with treatment plans and recommend the practice to others.

We'll close with these words of wisdom from Richard Corder, Senior Director of Service Improvement at Massachusetts General Hospital:

“ If the (physician) CEO doesn't get it, understand it, rally around it, speak to it, make it important among his or her team – then it's not going to work.¹⁰

This booklet is part of CAP's efforts to support physicians like you with resources that address important practice management issues. We hope you have found it useful.

For more information, consider downloading our other complimentary Action Guides on subjects like:

- HIPAA
 - Business Insurance
 - Cyber Risk
- And more...

Simply visit <https://www.capphysicians.com/practice-management-guides>

Physicians may also be interested in subscribing to Practice Management Digest, our free weekly roundup of original articles and the latest news on practice and risk management. Subscribe here: <https://www.capphysicians.com/digest>

In addition to superior medical malpractice coverage, CAP provides several complimentary benefits and coverages to all of its members, including::

- 24/7 Risk Management Hotline
 - Human Resources Support
 - Group Disability and Group Life Insurance
 - Cyber Risk Liability Protection
 - Administrative Defense and Employment Practices Defense
- And much more...

Visit <https://www.capphysicians.com/coverage-highlights> for details.

¹⁰ <http://content.hcpro.com/pdf/content/257750.pdf>



About CAP

The Cooperative of American Physicians, Inc. (CAP) has supported California's best physicians for nearly 40 years with outstanding medical professional liability coverage through the Mutual Protection Trust, an unincorporated interindemnity arrangement organized under Section 1280.7 of the California Insurance Code. In addition to superior medical malpractice protection, CAP provides comprehensive risk and practice management resources to nearly 12,000 California doctors.

This booklet is part of CAP's efforts to support physicians like you with resources that address important back-office issues. We hope you have found it useful.

For more information about CAP, or to get a no-obligation quote on medical malpractice protection, please **call 800-356-5672 or email MD@CAPphysicians.com.**

Published July 2018

If you find this CAP Guide useful,
please share it with your colleagues!



COOPERATIVE OF
AMERICAN PHYSICIANS

333 S. HOPE ST., 8TH FLOOR, LOS ANGELES, CA 90071 | 800-252-7706 | www.CAPphysicians.com

SAN DIEGO



ORANGE



LOS ANGELES



PALO ALTO



SACRAMENTO