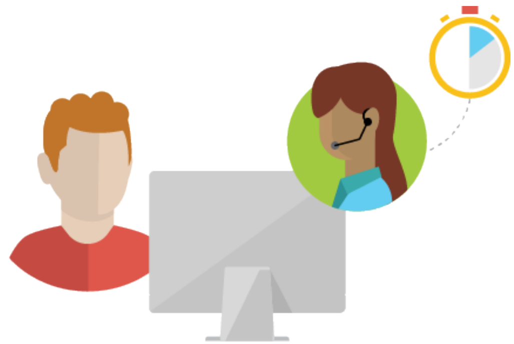
AMA | STEPSforward™

Patient Pre-Registration



Save Time for Your Patients and Your Practice

Developed in partnership with Asante Physician Partners

AMA & MGMA PRACTICE INNOVATION CHALLENGE WINNER

Douglas K. Diehl, MD
VP & Executive Medical Director, Asante Physician Partners

Brandon J. Lynch, MD, MPH
Family Practice Physician, Asante Physician Partners

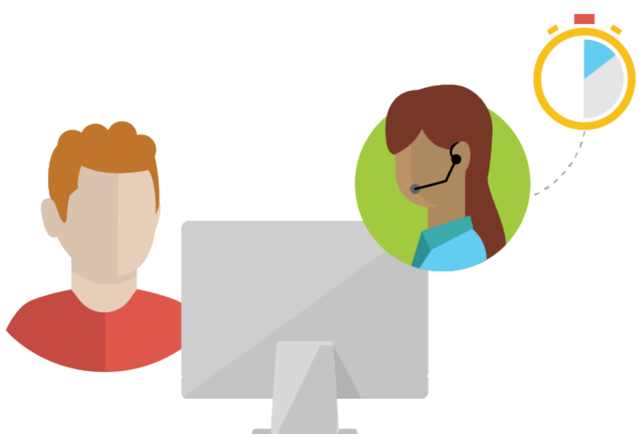
Bruce Budmayr, CMPE, BS
Business Development Manager, Asante Physician Partners

David W. Gilmore, MSQSM, LSSBB
Director of Operations, Asante Physician Partners

How Will This Toolkit Help Me?

Learning Objectives:

1. Identify steps to design and implement a pre-registration process for your practice
2. Describe how to develop a pre-registration script
3. Explain how to identify and train team members to serve as New Patient Coordinators
4. List methods to evaluate the process and gather feedback from new patients and team members



Introduction

A streamlined pre-registration process saves time and reduces paperwork for both the patient and the team.[1]
Helping your patients with registration saves them time trying to understand and accurately answer registration questions presented to them in paper form. Physicians and other care team members can also spend more time on the visit and less time on paperwork while being confident they have a complete medical history.
A **new patient coordinator (NPC)** conducts new patient pre-registration over the phone or in person prior to the initial visit. This conversation enables the new patient coordinator to capture all of the required demographic and payment information in the registration record and enter medical information, including medication list, allergies, and medical history, directly into the electronic health record (EHR) to reduce the data entry work required of clinicians at the patient's initial visit. Eliminating paper and entering information directly into your practice's registration software and EHR prevents mistakes. Emerging technologies may further streamline patient registration, including patient portals or kiosks that allow patients to enter a great deal of registration information themselves.

Four STEPS to Integrate Pre-Registration Into Your Practice

1. Design Your Pre-Registration Process
2. Develop a Pre-Registration Script
3. Identify and Train Team Members to Serve as New Patient Coordinators
4. Roll Out the New Process and Gather Feedback

1 Design Your Pre-Registration Process

Start by making sure you have a clear understanding of your current registration process so that you can incorporate pre-registration into your practice workflow. Note that with this approach, all registrations are entered directly into the registration software and EHR without the need for paper forms.

Work as a team to determine the information you will need to collect from patients during pre-registration. This toolkit includes a sample pre-registration process map that you can adapt to meet your needs. You can use the process map for pre-registration over the phone ahead of the appointment, or for pre-registration in person on the day of the appointment.

Pre-Registration Process Map
This tool shows the "before "and "after" processes for traditional registration and pre-registration. Adapt the pre-registration process map to meet your needs.
(PPT, 1,375 KB)

Define How You Will Determine Success

Establish metrics that will allow you to compare your current registration process to your new pre-registration process.

Consider using this pre-registration metrics worksheet to identify inefficiencies and set targets. You can use the same worksheet to compare your baseline metrics to measurements made after implementing the pre-registration process to evaluate the new process's impact. These AMA STEPS Forward™ quality improvement toolkits can help you tackle this change in a stepwise fashion: **Change Initiatives**, **Change Management and Organizational Development**, **Lean Health Care**, **Plan–Do–Study–Act (PDSA)**, **LISTEN–SORT–EMPOWER**, and **Getting Rid of Stupid Stuff**.

Pre-Registration Metrics Worksheet
(MS WORD, 45 KB)

Q&A

Who should I include in my discussion about new patient registration?

You should seek input from everyone involved, including the front desk personnel who answer patient questions about the current registration forms and the nurses or medical assistants who handle rooming. The perspectives of physicians and health IT team will be integral to the planning process, as well. If your practice has a **patient advisory council**, include them in the discussion, too.

Can patient pre-registration save my practice time and money?

Yes. Administrative time spent at check-in and during the clinical visit should be significantly reduced. **One practice estimated that they could save over $200,000 in physician and team time** per 1,000 patients pre-registered at their seven-physician practice using an electronic pre-registration process.[2]

2 Develop a Pre-Registration Script

Create a pre-registration script to guide the conversation between the patient and the new patient coordinator. Organize this pre-registration script so that it matches the fields in your registration software and EHR. The new patient coordinator will save time and make fewer errors if he or she can enter the information in the same order and in the same fields during the pre-registration discussion with each new patient.

Use the script as a training tool. Laminate one copy and post it near the phone where the new patient coordinator sits as a reminder until the pre-registration conversation becomes second nature.

Pre-Registration Checklist
Use this pre-registration checklist to ensure you collect all the information needed for an efficient and effective first visit.
(MS WORD, 44 KB)

To prepare your patients to provide their medical history, you can customize the welcome letter below to send to patients. It can include pre-registration prompts, asking them to prepare an updated medical history, including current medications and allergies. Having the patient prepare this information in advance will save time and improve accuracy whether the pre-registration occurs over the phone or in person.

Pre-Registration Welcome Letter
This welcome letter will help patients recall important information that the new patient coordinator will need to register them. Send this to patients before the coordinators speak with them.
(MS WORD, 39 KB)

Q&A

Does the new patient coordinator need to enter the information into the registration software and EHR manually?

The new patient coordinator should be trained to enter patient information directly into your practice's systems during the conversation with the new patient to avoid filling out a paper form that they will then need to re-enter or scan into the record.

While this approach may seem more time-consuming than entering or scanning paper forms patients fill out themselves, it may benefit your team in several ways:

- Resulting in higher quality data being entered into the medical record, which will empower your team to have more ownership of the information
- Giving the new patient coordinator the opportunity to explain why certain information is important to the patient's medical care
- Helping patients feel more comfortable asking questions about their upcoming visit and the registration information that the practice needs
- Putting patients at ease before meeting a new care team at their appointment

3 Identify and Train Team Members to Serve as New Patient Coordinators

New patient coordinators should have exceptional customer service and telephone skills, as well as competency with your practice registration software and EHR. The new patient coordinator can be a front office team member designated to handle new patient registration as part of his or her responsibilities, a current medical assistant, or a patient service representative. Depending on your practice specialty and the average complexity of your patients' care needs, a nurse may be a more natural fit for this position.

The new patient coordinator's responsibilities include:

- Guiding patients through the pre-registration process
- Informing the patient about any items to bring to the appointment, such as medications and prior medical records
- Obtaining accurate and complete demographic, insurance, and medical information
- Checking patient insurance eligibility and informing the patient of any co-payments that will be due at the time of service

- Scheduling the patient's appointment and giving the patient a copy of the appointment date and time, parking instructions, and directions to your practice
- Scheduling any laboratory or other tests based on your practice's protocols
- Helping the patient request transfer of prior medical records to your practice
- Answering questions about the registration process, practice, and medical team

Q&A

What training should I provide for my medical assistant or patient service representative to transition into the new patient coordinator role?

Medical assistants often need some procedural or workflow training regarding the registration process. Patient service representatives may need training on basic medical terminology and EHR documentation. Shadowing can be an effective way for medical assistants and patient service representatives to learn from your check-in team, schedulers, physicians, and nurses. If you have a **medical assistant professional development program**, consider adding a session on pre-registration to train your medical assistants. To make the most out of your training program, your patient service representatives could learn from your medical assistants about the essential clinical information they need to enter into the chart before the patient visit.

Where should the new patient coordinator sit to facilitate the conversation about the patient's medical history?

If possible, the new patient coordinators should have a small office with a door that can be closed for privacy, but with enough room for a family member to be present if requested by the patient. This is particularly helpful if your practice serves a large elderly population that is more likely to have family members or caregivers with them at their appointments.

Can the new patient coordinator collect insurance information at the time of pre-registration?

Yes. The new patient coordinator should **run an insurance eligibility check** and review the patient's benefits to explain his or her co-pay responsibility. If your practice is not in the patient's network, the new patient coordinator can explain what that means and confirm that the patient wants to keep the appointment.

How many new patient coordinators will my practice need?

The number of new patient coordinators will depend on the number of new patients you anticipate. **By way of example**, 2 new patient coordinators worked well in a practice of 7 physicians. In that setting, 3 of the 7 physicians were new and needed to build their patient panels, so they needed additional support to pre-register new patients. The second new patient coordinator covered lunch breaks and assisted walk-in patients to minimize or eliminate wait time.[1] Your practice may find that only one new patient coordinator is needed. You may also consider cross-training another medical assistant or patient service representative to cover for a single new patient coordinator.

Will the new patient coordinator need to dedicate all his or her time to pre-registration, or can this person fulfill another role on my team?

The new patient coordinator should have sufficient uninterrupted time to thoroughly collect all important information, accurately enter it into the registration software and EHR, and most importantly, make new patients feel welcome at the practice. If new patient coordinators have other responsibilities in the practice, you may find that the best approach is dedicating one day a week or half of each workday to pre-registration tasks. If you choose to do some or all of the pre-registration over the phone, you will be able to batch the work more easily than if pre-registration is done only in person at the time of the visit.

4 Roll Out the New Process and Gather Feedback

Start implementing the pre-registration process with new patients who still need to be scheduled. As time permits, reach out to new patients who have already been scheduled.

Solicit quarterly feedback from new patients and your team. Anecdotal feedback from physicians, nurses, and medical assistants about the quality of the clinical information entered during pre-registration will help improve the process. Prepare continuous training or education for the new patient coordinators based on this feedback. Review your metrics worksheet to determine how pre-registration has impacted your practice.

Consider customizing the run chart below to display the results visually.

Run Chart
Use this tool to track and display your initiative's progress over time.
(MS EXCEL, 26 KB)

Q&A

How long should it take to complete registration with the new process?

Pre-registration by a new patient coordinator should take approximately 15 to 20 minutes.

What about walk-in new patients?

Patients who walk into the clinic can meet with the new patient coordinator in person for 15 to 20 minutes to complete pre-registration before seeing the medical team. This will ease the burden on the patient service representatives who are checking in other patients, and it will ensure that the clinical team has all of the information they need for an efficient, effective visit.

The same approach can be applied to established patients who need to update demographic or insurance information before their appointments.

What results could I see with pre-registration?

Results of using pre-registration may include increased patient satisfaction, increased physician and care team satisfaction, more efficient new patient appointments, reduced new patient check-in times, and more efficient use of resources.

How quickly could we see results with pre-registration?

It depends. The efficiency of your current registration practice, practice size, and new patient coordinator resources are all factors. One practice reported that it took approximately three months to achieve consistently accurate, single-take pre-registration data entry.

Conclusion

Standardizing and streamlining new patient visits with pre-registration can save your practice time and money while providing a better experience to both patients and team members. The new patient coordinator can be a welcoming presence, and having a new patient coordinator reach out to new patients before their first appointment can help everyone have more efficient visits.

AMA Pearls

Pre-registration saves time and reduces paperwork.

Helping patients with registration saves the patient time trying to understand and accurately answer registration questions presented to them in paper form. Physicians and other care team members can also spend more time on the visit and less time on paperwork, while being confident they have a complete medical history.

Use technology to your advantage.

Eliminating paper and entering information directly into your practice's registration software and EHR prevents mistakes. Emerging technologies may further streamline patient registration, including patient portals or kiosks that allow patients to enter a great deal of registration information themselves.

Article Information

Disclosure Statement: Unless noted, all individuals in control of content reported no relevant financial relationships.

Renewal Date: 04/24/2021

References:

1. Gilmore D, Alexander S, Robinson AC. New Patient Registration Process. Master's thesis. The National Graduate School of Quality; 2014.
2. Pre-registration case report: Asante Physician Partners Family Medicine. AMA STEPS Forward™ practice improvement strategies. April 27, 2016. Accessed February 14, 2021. https://edhub.ama-assn.org/steps-forward/module/2702563