

5 Key Performance Indicators of Your Front Desk

Presenters

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About SpectraSoft

20 years in Medical Scheduling

Over 5,000 Hospitals and Clinics

Extensive Research in Practice Analytics



What is a KPI?

A **Key Performance Indicator** measures how well you are meeting an important business objective.

KPIs are for EVERYONE

No practice is too urban, rural, specialized, gentrified or marginalized to run on KPIs

3

Rules

KPIs Require Good Data

Consistent – measured the same way every time

Accurate – you can rely on it for key decisions

Steady – collected, reviewed at regular intervals

Objective – seen on a dashboard or spreadsheet

KPIs Lead to ACTION

If you can't act on it, why measure it?

KPI Management is as simple as Read & React

KPIs equip you to manage issues in minutes a week.

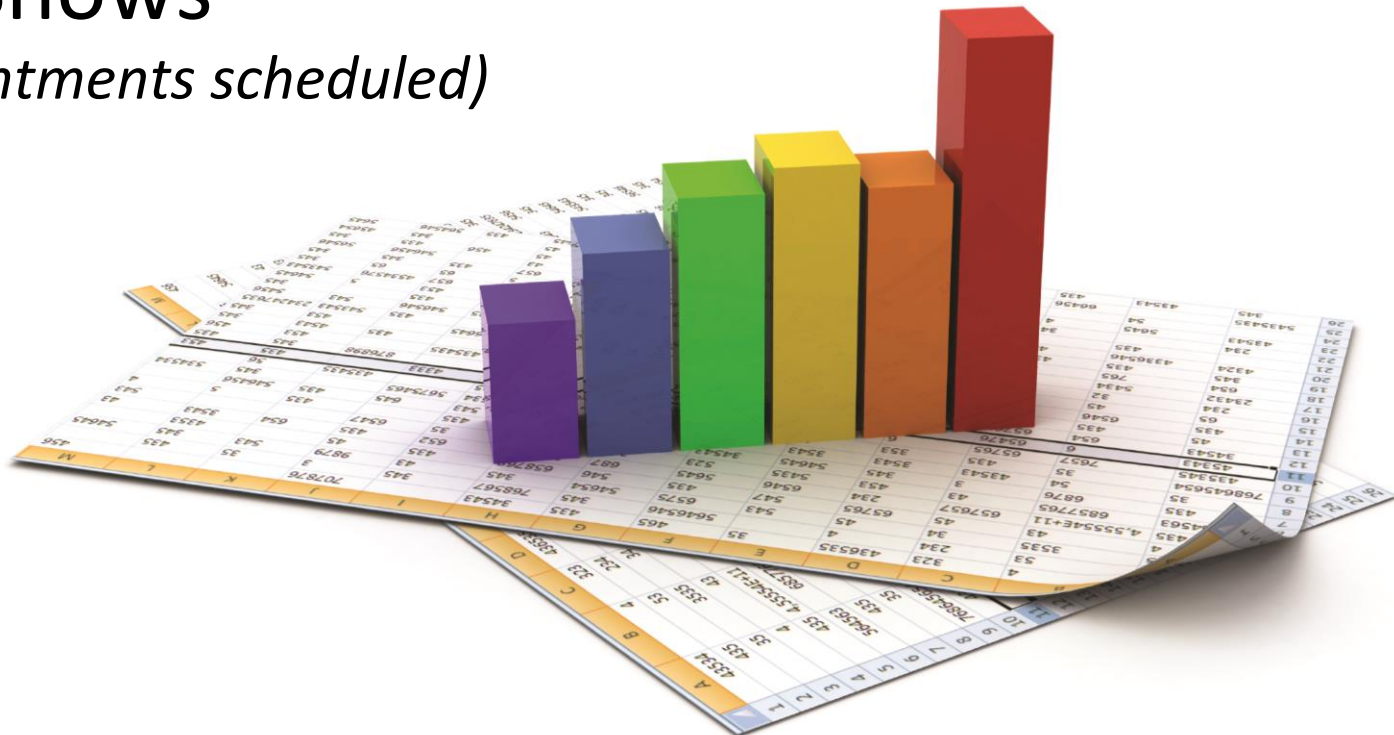
5 Ways to Use KPIs

- Guide a Long Process
- React to Important Trends
- Capitalize on Opportunities
- Direct Your Staff Management
- See Your Practice in New Ways

1. Guide a Long Process

No Shows

(% of total appointments scheduled)



Why are No-Shows an important KPI?

- **The easiest revenue to recoup** – cutting no-shows is usually easier than reducing payer denials and underpayments
- **A reflection of your professionalism** – how seriously your patients perceive your work and the work of your providers

What's a good a no-show rate?

- **Discipline**
(PT, Behavioral, Dermatology will all be different)
- **Nature of Appointment**
(Required? Painful?)
- **Patient Population** (Demographics, Insurance)

Key Concept:

KPIs are best derived from past performance and future goals. Don't measure your success based on someone else's results.

Data You Will Need

- Total Appointments and No-Shows per Month
- Reasons for No-Shows
- No-Shows By Payor, Provider, Diagnosis
- # of Reminders Sent by Email/Text/Phone
- No-Shows per Patient
- “No-Show” Talks that Providers Have with Patients

What are the manageable factors of a no-show at your practice?

- Forgetfulness
- Low priority
- ~~Fear/Pain~~
- Unmotivated
- ~~Finances / Payer / Co Pay Issues~~
- ~~Lack of Transportation/Caregiver~~
- ~~Long wait times~~
- ~~Patient Compliance~~

Where We're At

18%

No-Show Rate



10%

How We Got Here

50%

Get Reminders

15%

Repeat No-Shows

??%

"No-Show Talk"

What We Will Do

95%

Add Email/Text Reminders

100%

Fee for Repeat No-Shows

100%

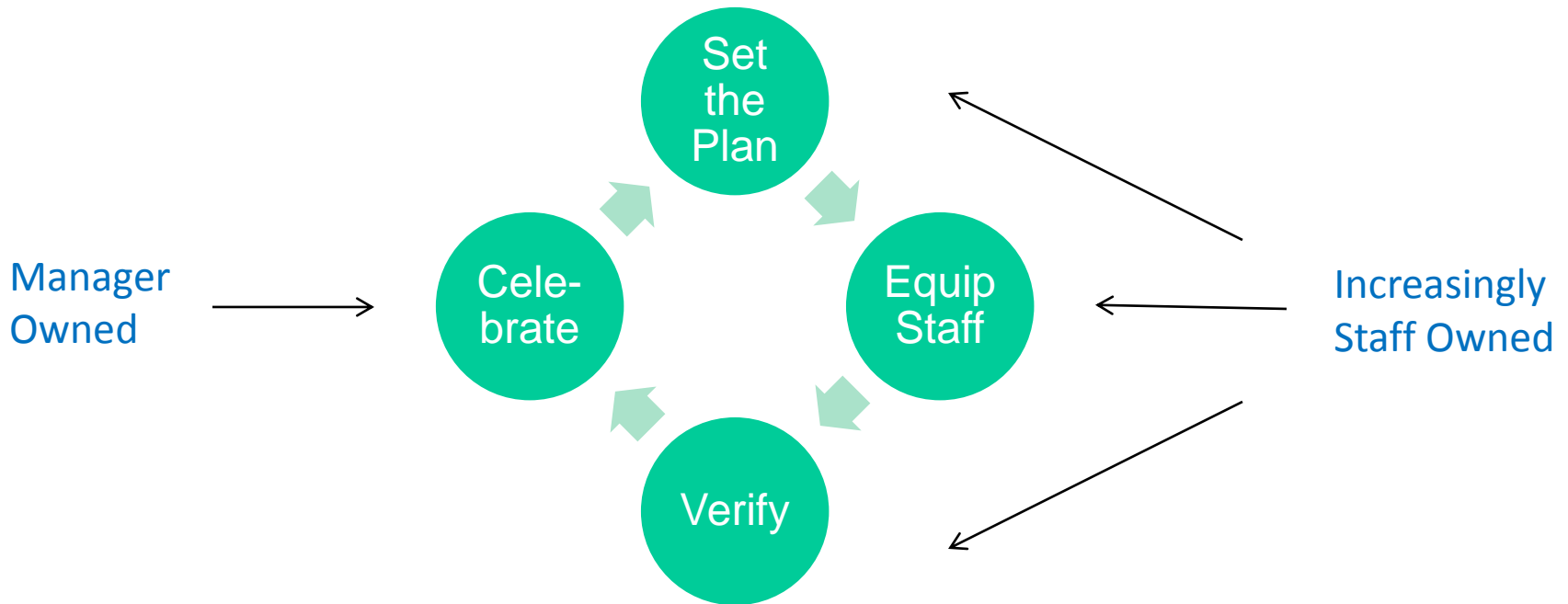
'No-Show' Talk From Provider

Monthly KPI Meeting

1. Review the Action Plan
2. Equip Your Staff
3. Verify
4. Celebrate
5. Set the New Standard

Your staff must own the KPI. They run the reports, present the numbers and explain the results.

Monthly KPI Review



You can manage a single KPI in as little as 15 minutes a month!
Or manage several KPIs in one longer meeting.

2. React to Important Trends

New Patients
(Total Per Month)



Data You Will Need

Monthly Trend reports of every possible referral source (even ones that currently generate no referrals:

- Physicians
- Related Professions (Lawyers, Courts, Churches, Golf Pros)
- Marketing (ads, signage)
- Patient Word of Mouth
- Network Visibility

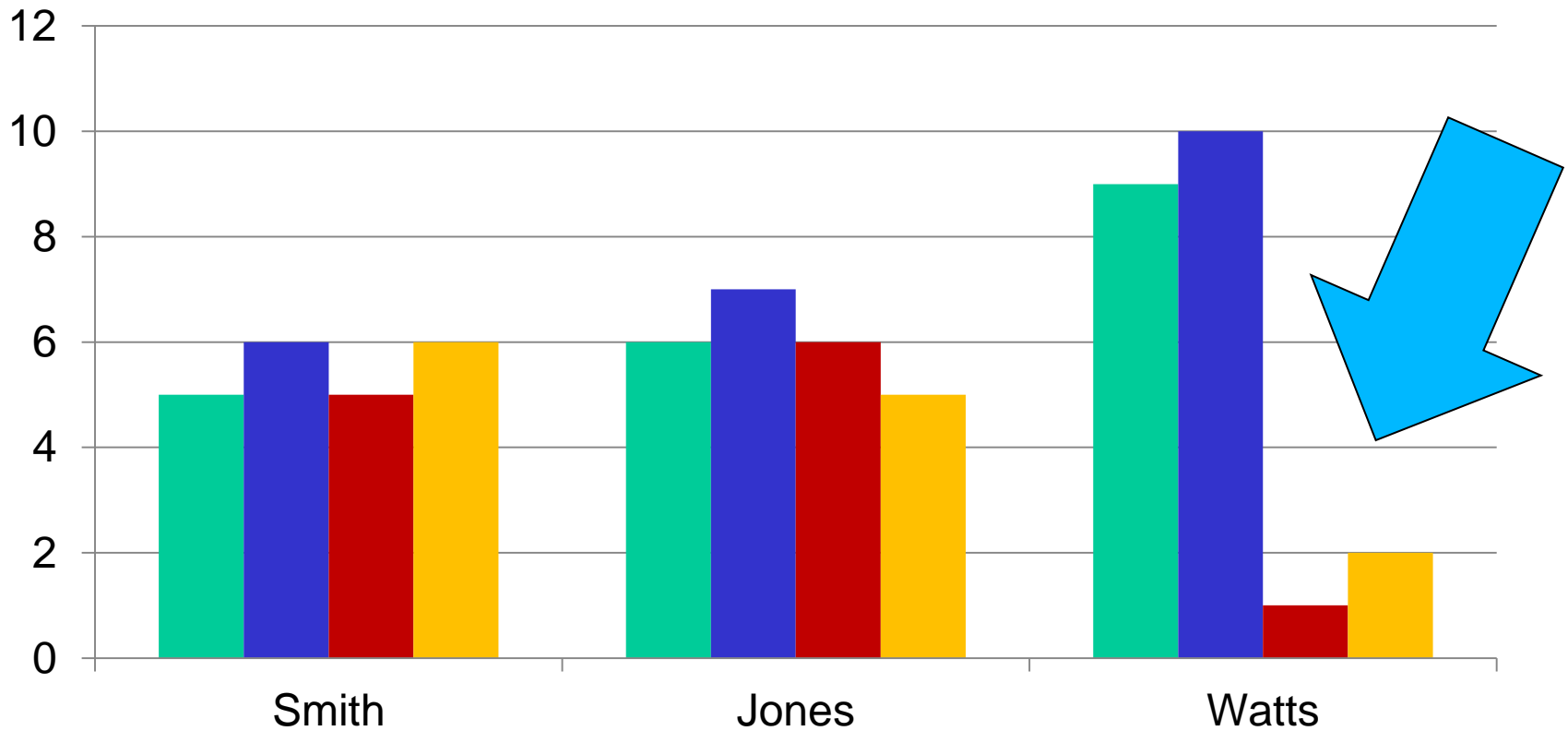
Set up each of these referral sources in your scheduling system so you know the source of every new patient.

Key Concept:

Trending KPIs typically involve solving problems.

- A *Process* is a steady, continuous path toward a goal, with regular adjustments along the way.
- A *Problem* is a sudden detour away from your goal that requires a major course correction.

Referrals By Month



Testing Something New

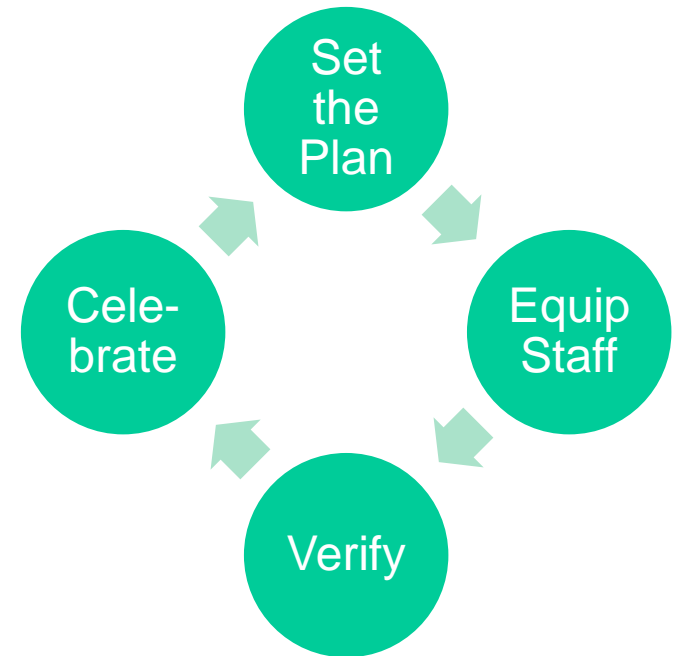
Not everything works, and certainly not right away

- Budget for failures
- Plan to be nimble
- Review regularly
- Structure your test to deliver a “Success” or “Failed” result

The screenshot shows a New York Times article titled "Hermosa Beach, Calif., Voters Give Thumbs Down to Oil Drilling" by Adam Nagourney, dated March 4, 2013. The article text discusses a vote in Hermosa Beach to deny permission for oil drilling. Overlaid on the right side of the article is a yellow advertisement for SpectraClini that reads "Book your next PT appointment from your SpectraClini phone!" and includes a "Start Here" button. The advertisement also features an image of a woman using a smartphone.

Monthly KPI Trend Review

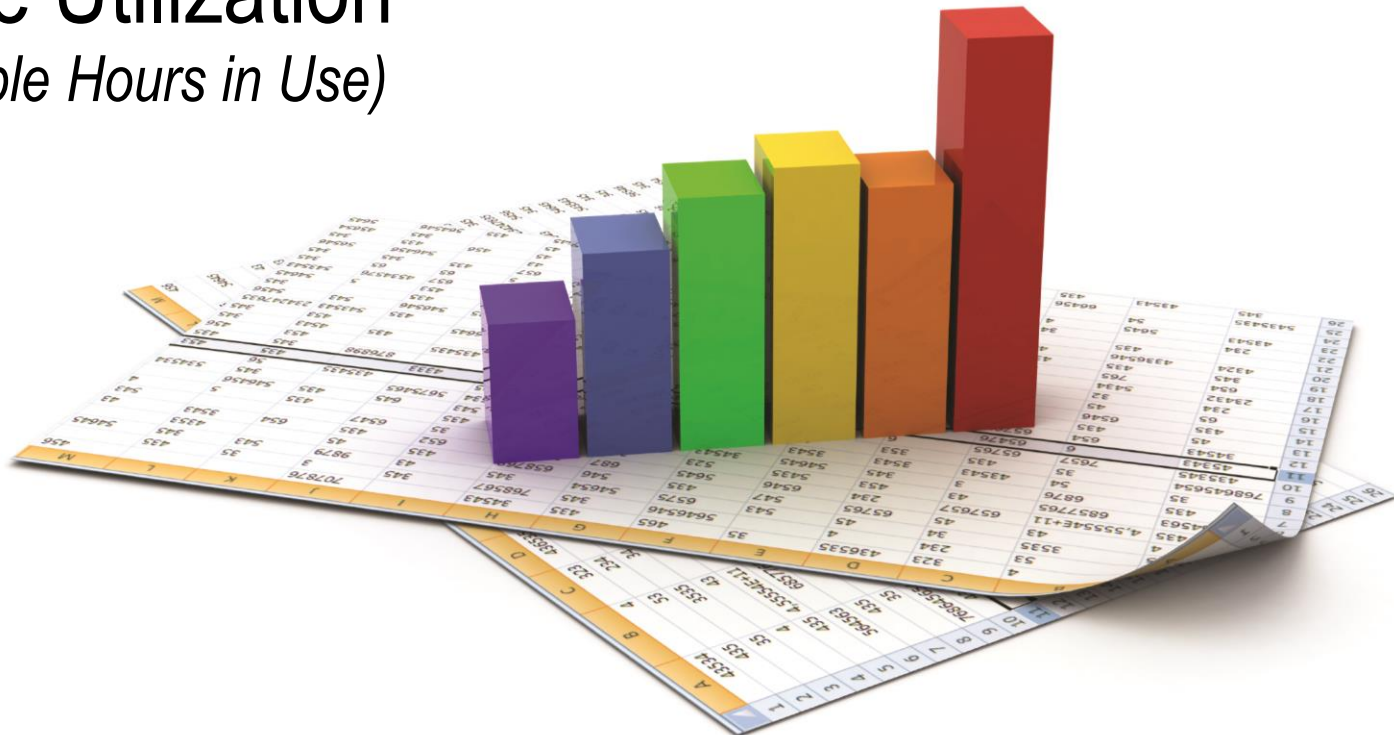
- Critical to review monthly trends of all major referral sources
- Meet often enough to address major changes
- Clear assignments to address any anomalies



3. Capitalize on Opportunities

Resource Utilization *(% of Available Hours in Use)*

- **Equipment**
- **Rooms**
- **Providers**



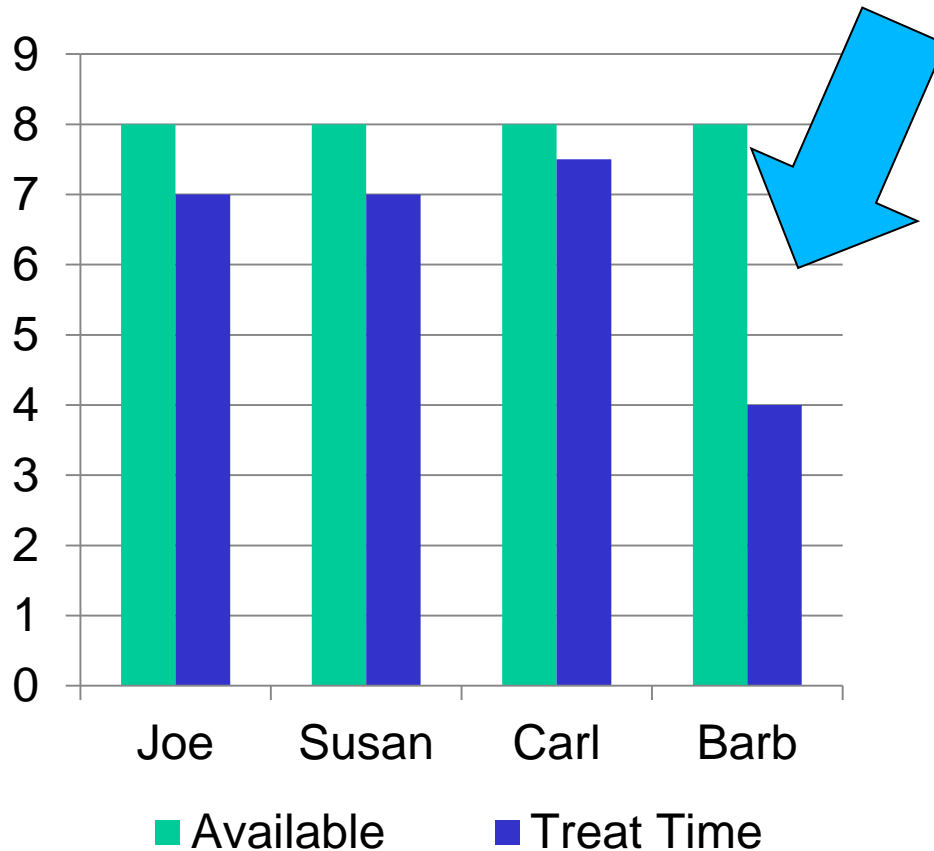
Data You Will Need

- How many appts scheduled for a resource per day
- What hours of the day is the resource available
- What % of day the resource is used

Key Concept:

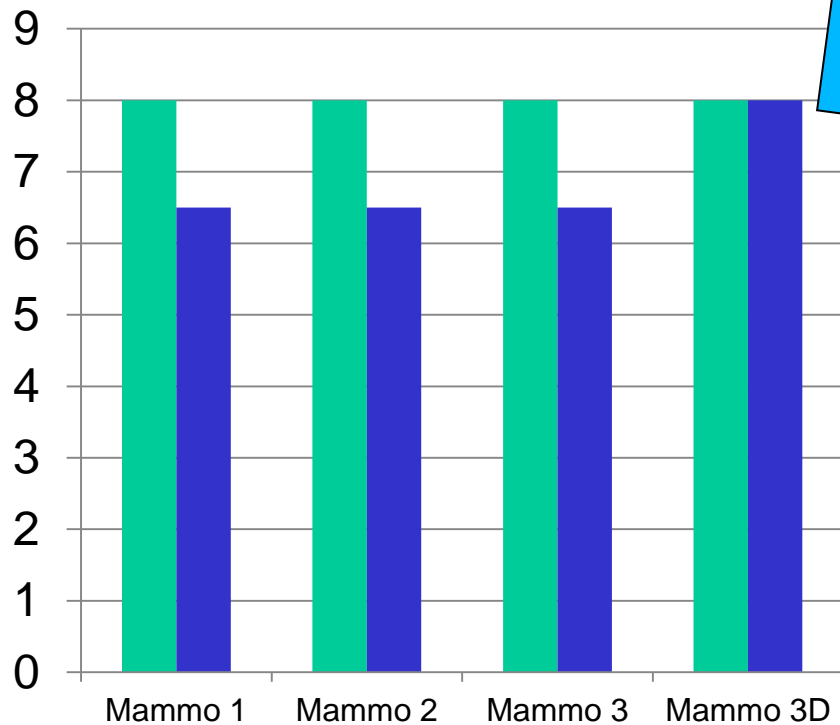
KPIs do not always point you to the right action. They can only identify the opportunities.

Managing Staff



- Not being scheduled
- Patient request
- Time spent charting
- Serial no-showers

Managing Equipment



- Manage pt expectations
- Work w/ referrers
- Talk to schedulers
- Buy new machine

Monthly KPI Resource Meeting

- More of the action items will fall on the manager/owner
- Key thinkers must attend, not necessarily “KPI owners”

4. Direct Your Staff Management

Personal Performance Stats



Key Concept:

If you wait til your employees, patients or partners complain, the damage is already done.

Common Problems

- Therapists rescheduling chronic no-showers
- X-ray techs in a pool pushing cases on other techs
- Front desk personnel not collecting copays
- Providers rescheduling appts for personal reasons

Don't wait for the complaint!

Monthly KPI Conduct Review

Review reports that typically are only run as a follow-up to a complaint. By doing this proactively, you...

- Nip problems in the bud
- Promote a fair workplace
- Show your employees you care

5. See Your Practice in New Ways

Patient Satisfaction *(Rating per Case)*



Key Concept:

KPI data is not always in your practice management system. Sometimes you need to seek it out.

Data You Will Need: Patient Survey

Numerical Ratings

- Overall satisfaction
- Clinician
- Front Desk
- Billing Services

Text Responses

- What did you like best
- What did you like least
- What could we do better

Monthly KPI Patient Satisfaction Review

- Open up with your entire staff on the results
- Let your staff take ownership
- Don't over-react to one-off complaints

Summary

1. Guide a Long Process
2. React to Important Trends
3. Capitalize on Opportunities
4. Direct Your Staff Management
5. See Your Practice in New Ways

Summary

1. KPIs are for EVERYONE
2. KPIs Require Good Data
3. KPIs Lead to ACTION
4. **YOUR ENTIRE TEAM MUST TAKE OWNERSHIP OF YOUR KPIs**

Q & A

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