0 (0s):

Hi, it's Dr. Weitz. Thank you so much for joining me for this episode of the private medical practice Academy, que the band pop the champagne, you've scheduled your first new patient. Now what, there's way more involved to getting that patient into your practice, then simply scheduling the patient. You actually have to do something with them. One of the things you're going to need is a new patient packet. Why? Because you need to get information from the patient and you want to communicate information to the patients. In today's episode, I'm going to talk to you about the items that you will want to include in your new patient packet. Let me start by telling you that your new patient packet is where you make your first impression.

0 (45s):

I'm sure you've heard the cliches about how the first impression is the lasting impression. This is actually a factual statement. Other than that initial contact, when the patient schedules their appointment, this is where they're going to get a flavor of your style and how your office runs. That's it. You're going to want to put some thought into presenting your new patient packet so that you put your best foot forward. Look, I may be old fashioned, but you're definitely going to want to have a physical, new patient packet. People love to have something tangible. Sure. There are people who will only read their books on their tablet, phone, or other device, but books are still being printed and sold.

0 (1m 25s):

Some people love to actually hold the book in their hand. I'll come back to talk to you about the printed version later, but suffice to say, you're going to need one for now. Let's focus on the electronic version of your new patient packet. The easiest way for you to provide your new patient packet is through the patient portal of your EMR. You'll need to define the process by which the patient is notified to access the new patient packet through the portal. This is imperative because many patients aren't going to ask you whether you have a portal or where to find the portal or where to find the new patient packet. Now you may not be using any EMR that even offers a patient portal.

0 (2m 5s):

And even when you tell patients that they need to access things through the patient portal, many of them don't do it. Okay? Even when you tell them there's a new patient packet and they need to complete it before their visit still doesn't happen, this is why you need to have your new patient packet in multiple forms. And in multiple locations, all of the contents of the new patient packet should be available on your website. You're going to want to place it on your homepage so that it's easy for the patient to find. And you need to tell the patient that the new patient packet can be found on the website. Don't assume that the patient is going to know where to look, let alone, that they're going to know to complete the forms or review any information that you have provided in another place that you may consider posting your new patient packet is on your Facebook business page.

0 (2m 56s):

Now Facebook business pages, aren't particularly for marketing and gaining new business unless you're buying Facebook ads, but your Facebook business page could be a very useful resource for communicating with your patients. And it's free. You can post the contents of your new patient packet as a resource start by creating a post that welcomes new patients to your practice, and then change it from a post to an announcement and pin it to the top of your feed on your Facebook page so that patients can easily see it and then know to go look in the resource section to find that new patient packet.

0 (3m 36s):
Then of course, there's the old fashioned physical new patient packet that can be snail mailed out to the patient. I understand that you're not going to want to mail out the new patient packet to everyone because it's time consuming and it's expensive, but you really need to get the information both to and from the patient before the visit, if at all possible, I would strongly recommend that as part of your scheduling process, you ask the patient how they'd like to access the new patient packet information. This is especially important, depending on your patient population. For example, asking my 85 year old father-in-law to access his new patient paperwork through a portal, that's a totally losing proposition.

0 (4m 18s):
If you want the patient to download forms and send them back to you, how is this going to happen? You need to provide them with a secure way to send an email with their patient health information. If you're thinking, okay, then they can just fax the forms, realize that the patient may not have an EFX capability on their computer. And if you're didn't tell me that they can download the forms and print them. What if they don't have a printer or a fax machine? My point is that you're likely to have patients that don't have computer access or who are in particularly computer savvy. And they may want the physical new patient packet mailed to them by asking the patient how they'd like to access this information.

0 (5m 0s):
You'll end up only snail mailing the ones that are actually requesting it. The one thing I want to stress to you, however, is that not getting a new patient packet into the hands of that new patient ahead of time is going to have costly effects to you. If all else fails, you can give the patient the new patient packet at the time of their appointment. But think about this. You tell the patient to arrive 10 to 15 minutes early, to complete whatever paperwork you're looking for. If you're lucky the patient arrives at their scheduled appointment time, guess what happens all of a sudden you're behind schedule and you don't have any of the necessary background information.

0 (5m 40s):
Now, everyone is cranky. Your new patient thinks your office is inefficient. Your existing patients are angry because they're hanging out and waiting because somebody else made you run late and you're stressed out because you're behind. Does this sound familiar to you? If so, let me you, that this is largely avoidable. If you have a patient who does not have the new patient packet information filled out ahead of time, make sure that you tell them to come at least 30 minutes before their scheduled time. This is obviously a less than optimal

solution, but this is one of those cases where something is better than nothing.

0 (6m 21s):

Now let's talk about what things go into a new patient packet. I'm going to break this down for you into two sections information that you need to get from the patient. And then the information that you need to provide to the patient. First, you need a registration form. What exactly goes into a registration form? The registration form is where you're going to collect all of the demographic information that you need to communicate with that patient, including the patient's name, the date of birth, phone number, address, and email address. If you're going to build their insurance, you need to collect their insurance information as well, including the insurance company, name, the group number, the member number, the policy holder's name and the contact phone number for the insurance company has an aside, the group number and member number should be sufficient.

0 (7m 16s):

As long as you have the name of the insurance company. However, just to be on the safe side, I also like to ask which specific product it is because an insurance company may have an HMO, a PPO, and a POS. You may be in network for one product and not for another. So if you're trying to figure out whether you're an in network provider, you're going to need to be as specific and collecting this information on the registration form as possible. And as should be obvious, you're going to need this information in order to check the patient's eligibility next, do you need a patient questionnaire and history intake form?

0 (7m 56s):

The patient questionnaire should ask guided questions regarding the history of present illness and or the reason for today's visit. It should also include a section for medications, allergies, past medical history, past surgical history, social history, and a review of systems. You're also going to want to ask which pharmacy the patient is going to want any prescription sent to. Now, while this may seem like a lot of information to try and collect ahead of time, it's really worth the attempt. First of all, if patients have time to fill this out in a non rush setting, you're much more likely to get a complete set of information.

0 (8m 36s):

Second, you can have all of this entered into your EMR ahead of time, and then you just have to review it and annotate it. This will significantly help your workflow if you and your staff are not trying to get all of this information in at the time of that visit next, you may want to obtain records from other providers, or you may want to send them to other providers. For this reason, you're going to want to have a medical records release form on file. You'll also want to have the patient complete and sign a release of information form. This is a different form than the medical records for the patient information release form is probably one of the most important forms in order to help you be HIPAA compliant.

0 (9m 24s):

Basically the patient needs to sign a form saying who you can release information to. I can tell you that scrambling to figure out whether or not you can actually talk to the person on the phone about that patient is not the way you want to handle a phone call. Let's say that a family member calls and says I'd like to refill my dad's medicine, but I don't remember the name or the dose, unless that person is on the release of information form. You can't actually have a conversation with that person about their dad's medication, no matter how needed that medication is. And if you don't have the signed form, then you have to chase after the dad to get him to sign the form and fax it or email to your office so that you have it on files so that you can talk to who's ever calling on his behalf to get that medicine refilled.

0 (10m 10s):
And if you're listening to me thinking I have a headache from what she just said, this is exactly the reason to get that form signed on the front end. As I said earlier, the purpose of the new patient packet is to provide information to the patient, recognize that some of the information you are literally just giving to the patient, but there are other pieces that you actually need them to acknowledge as a policy and sign. First, you need to provide patients with a comprehensive financial policy statement. This form should clearly delineate your practices, financial policy, and should be signed by the patient and someone in your office.

0 (10m 54s):
You should also have a credit card on file policy. That's signed by the patient and someone in your office. You're going to want to make sure that the patient has a signed copy of these forms and that you keep one for your records this way, when you're asking for payment and the patient says they didn't know, you have proof that they've actually been notified. This is especially important when you're performing services that may or may not be covered by insurance. Because if you're in network, you have to notify the patient upfront and get their consent. Next, you need to give the patient a form with your HIPAA policy statement. Then the patient needs to sign a form saying that they've received your HIPAA policy statement.

0 (11m 37s):
If you're going to write any controlled substances, you're going to want to have a controlled substance agreement and have the patient sign it in general. This may not be a bad idea because with MIPS, you actually get bonus points for reviewing the patient's PMP to make sure that they're not getting controlled substances from multiple providers. So having a controlled substance agreement actually shows that you're compliant. And if anything goes a long way to giving you bonus points, I would also recommend to you that you have a form that lists patient responsibilities. Now, before I go on, I want to reiterate to you that every form that a patient signs should be witnessed by somebody in your office, and then the patient should get a copy and you should keep a copy on file.

0 (12m 25s):
And for all of you who think this advice only holds true for practices that take insurance, think again, every business needs to keep these kinds of records. It will keep you out of trouble now onto the things that you're

going to give the patient. Basically I would categorize the following information as marketing materials. The first is a brochure with an overview of your practice. You're going to want to have an overview with your mission statement, and then describe your practice philosophy and what services you offer. Be sure to include your provider bio. Remember this is a great place to sell yourself. I would also strongly suggest to you that you include patient education materials in this packet.

0 (13m 9s):
Let's say that you're an interventional pain management physician like me. You could talk about causes of low back pain or treatment for low back pain. This is where you could have a sheet on specific procedures you do, or let's say you're a family medicine physician. You could have a handout on what to expect from the patient's annual visit. Again, I'm going to come back to the fact that first impressions matter, providing educational materials gives the patient a flavor of your style and what they can expect from you and your practice. And other thing you're going to want to provide is directions to your office. Before you tell me that everybody has Google maps, let me stress to you that the last thing you want is for a patient to either no show you or to be late, because they didn't know how to get to your office.

0 (13m 58s):
Don't assume that the patient knows how to use Google maps or that they even have a phone with a data plan. So in terms of directions, in addition to giving them a map, you want to include any of the nuance things that are going to make, getting to their first appointment easier. For example, are there tricks to finding better parking is the parking free. Perhaps all of the handicap parking spots are located on one end of the parking lot in that case, which is the easiest store for them to access. If there are multiple entrances, which entrance should they come to so that they walk the least amount of distance.

0 (14m 37s):
Now, all of these things may seem trivial to you, but they can make a huge difference in how the patient feels about accessing that first appointment. If they feel like they have to walk halfway around the world to get to you only to find out that there was a simpler way to get to your office, you can only imagine that they're not going to be terribly impressed. So once you're a new patient packet is done, you simply have to update it. If you change any of your policies, or if you add new providers and you need to add a new provider bio, the things that I want you to hear are that from the patient's perspective, a professional comprehensive new patient packet goes a long way to making a great first impression.

0 (15m 23s):
The key takeaway for you, however, is that a well done new patient packet is going to tremendously improve your practices workflow. Thanks for joining me. Be sure to sign up for my newsletter below, and I'll be sending you tips on how to start your practice best run your practice, grow the practice, and then ultimately be able to leverage your medical practice into multiple other businesses. I hope to see you soon.