TIPS TO IMPLEMENT & MANAGE E-BOOKINGS

As you prepare to implement e-booking, consider the following steps:

Get Ready

➤ Identify the person(s) responsible for implementing e-booking into your practice.

➤ Outline the current roles and processes needed to schedule a patient via telephone and in person.

➤ Outline the future roles and processes needed for patient self-scheduling; and the roles and processes needed to continue to support telephone and in person bookings.

➤ Outline any additional steps to support the use of automated reminder emails and / or calls.

Pick a Date

➤ Select a kick-start date for when you plan to begin e-booking.

Train the Staff

➤ Select a training date.

➤ Plan how and when staff will be trained for smooth transition.

➤ Review the new workflow so roles and processes are clear.

Allocate the Schedule

▶ Confirm the proportion of appointments in the schedule to make available for online booking.

▶ Consider choosing a percentage of daily appointments available for online booking with plans to gradually increase over time in order to meet patient demand.

Inform Patients

▶ Consider how you will enrol patients.

▶ Consider choosing to start with a small number of patients to test the functionality, process and usage before you roll it out more broadly.

▶ Determine how you will begin to inform patients.

- Encourage staff and clinicians to invite patients to join Yocale.
- Update the phone answering message.
- Place the Yocale easel in the office and posters in the exam rooms.
- Affix the Yocale sticker to your door or window.
- Add online booking information to appointment card reminders, emails, business cards, and receipts.
- Add online booking to social media accounts.
- Add the Yocale Book Online button to the website.
- Consider providing a tablet or computer in the waiting room for patients to signup.
- Print a QR code and affix it to your Yocale easel board or your window. Or, use the QR code in any advertisement.

Plan The Future

▶ Reminders

- Continue to remind clinicians and staff and encourage them to inform patients.

- Ensure all signage, voice messages, website content and other communications are up-to-date and visible.

▶ Support the implementation

- Identify someone to track and follow-up on any issues related to Yocale.

- Monitor and review the new processes regularly (e.g., daily or weekly) until any issues have been resolved.

▶ Update staff and patients

- Remember to hold a short update or feedback session with the team. Quick, ongoing huddles to:

  ○ Answer questions and resolve problems can work well too.

  ○ Adjust the new workflow and associated processes as needed.

▶ Measure and Evolve

- Develop metrics that can help identify what is working and what isn't, including:

  ○ Patient use rates

  ○ Appointment no-show rates

  ○ Patient and staff satisfaction

- Monitor and adjust the number of appointments available online to meet patient demand.

- Establish the timeline and frequency within which ongoing review and discussion should occur.

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