



# TIPS TO IMPLEMENT & MANAGE E-BOOKINGS

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**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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