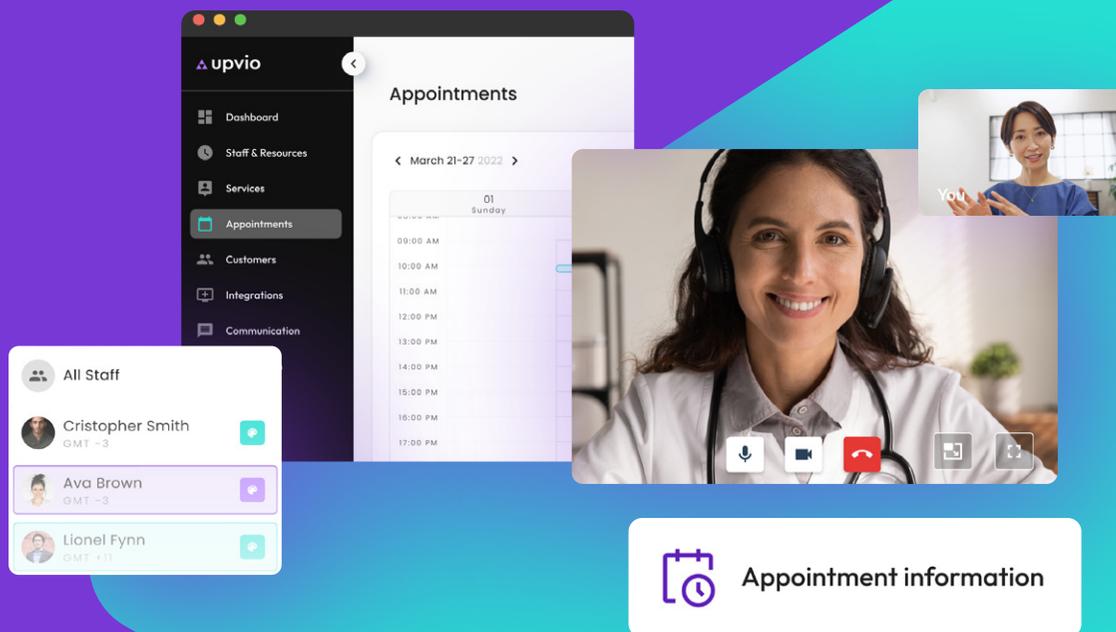
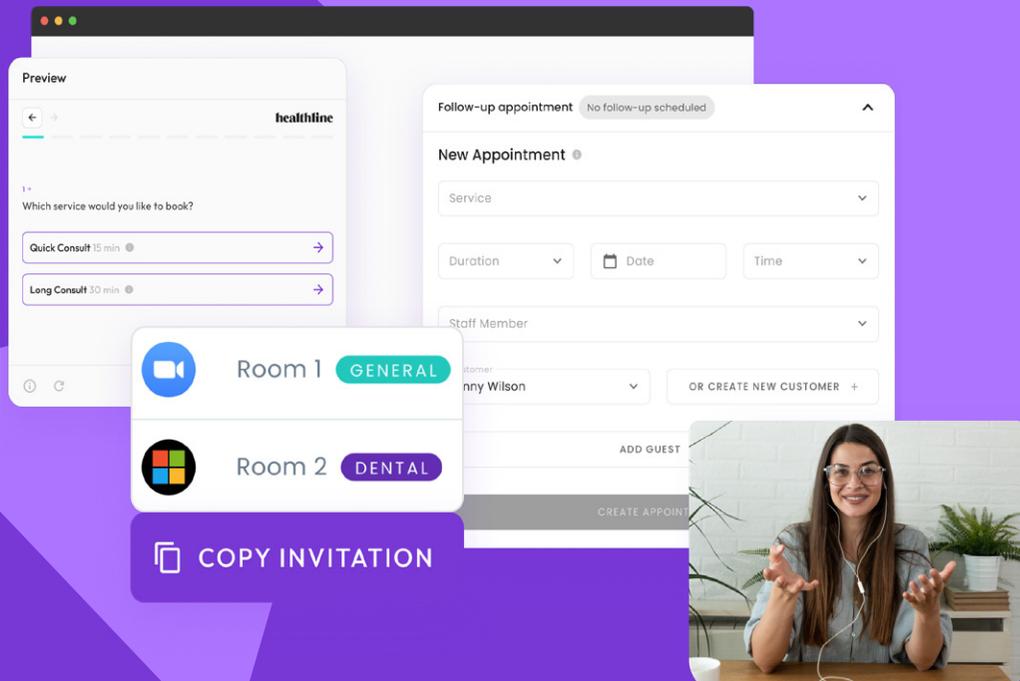


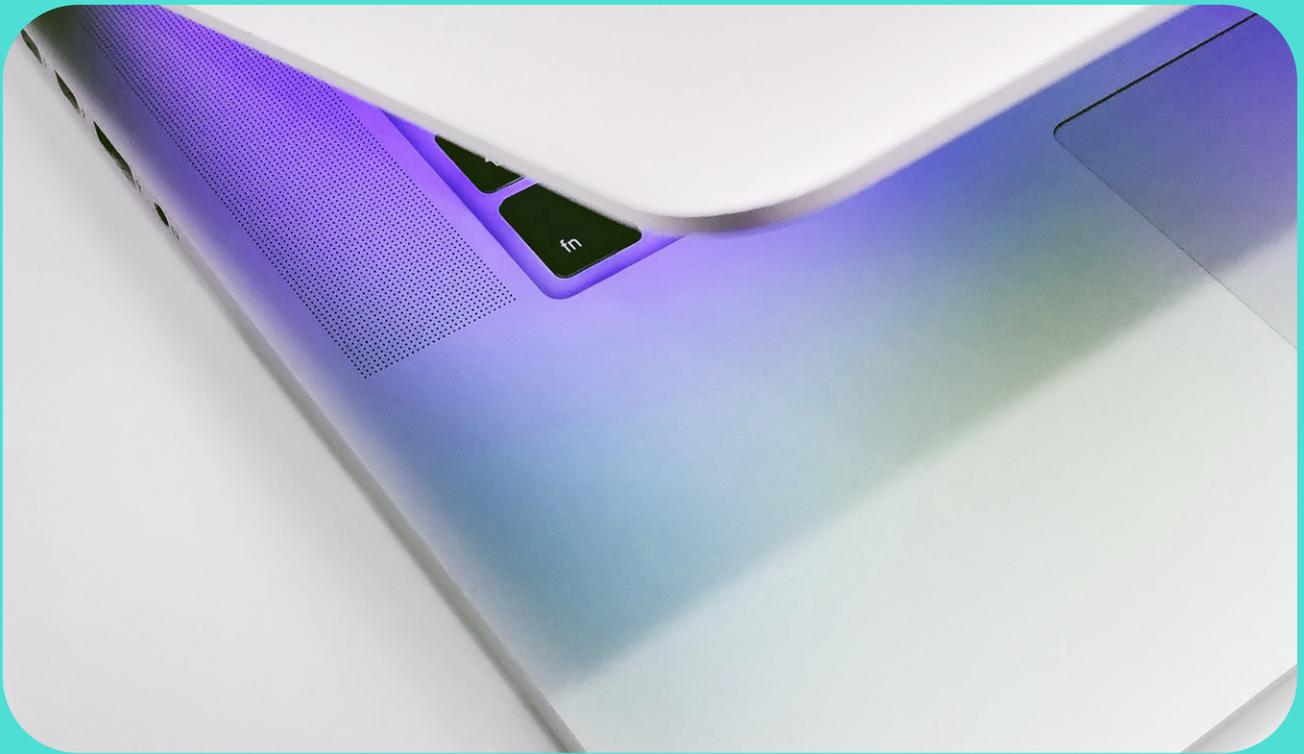
Online Appointment Scheduling

Best Practices



01. Online Appointment Scheduling Best Practices





1.1. Introduction

Businesses such as healthcare providers use appointment scheduling apps to give their clients the ability to manage their appointments online at their own convenience.

These tools remove the need for a human phone operator, who manually inputs and confirms appointments in a calendar.

Following some of the best practices we are sharing with you,

can lead to drastically positive improvements of how your customers experience bookings.

With and on top of that, these tools will make life for your front-desk staff a lot easier.

Come along on this journey as we show you some stunningly overwhelming statistics that highlight just how vital it is for you to get the appointment scheduling process right.

According to a study by



46%

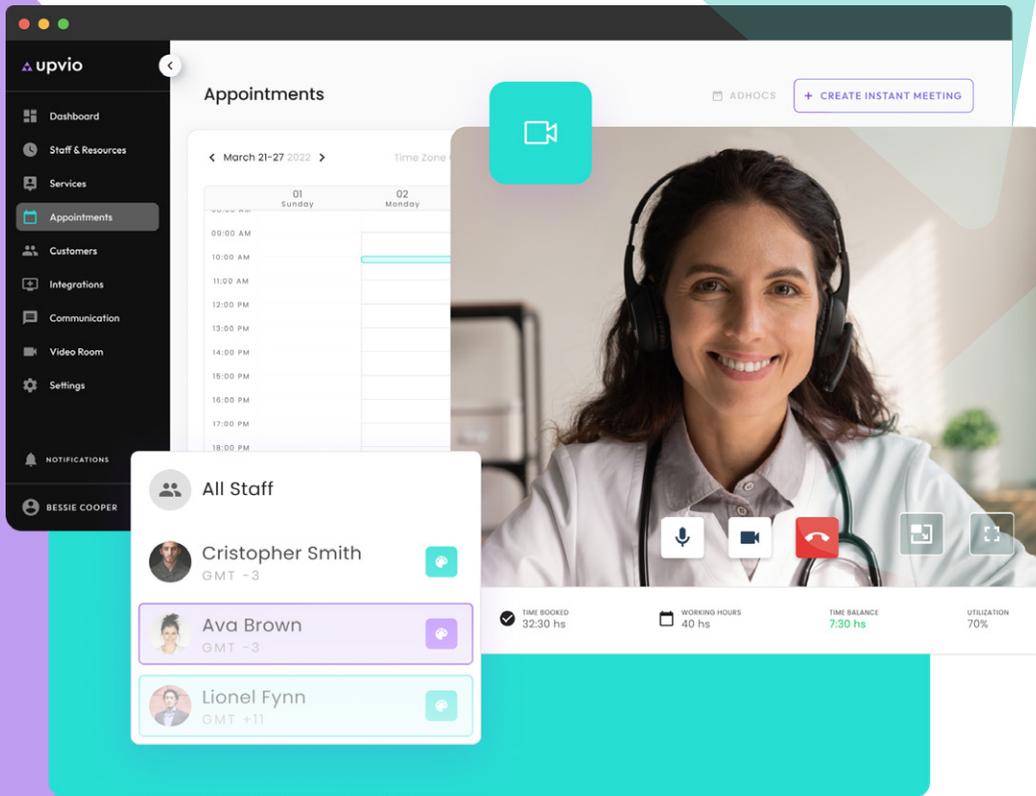
of online appointments are booked by clients themselves.

67%

of patients prefer booking online.

68%

of patients are more likely to choose a provider who offers ability to book, change and cancel appointments online.



Precious time

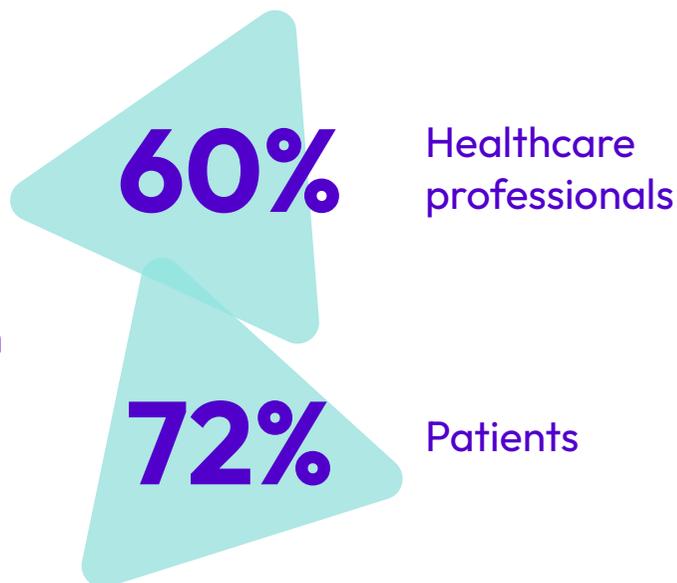
As a healthcare provider, your time is precious. You don't want your patients going without the care they need because your schedule is full or overbooked or not in sync across platforms where online booking is available – only to end up having huge open slots of time when patients are no-shows.

With online appointment scheduling tools and setup, you can tailor your appointments to your exact business needs, offer flexible booking options across teams, different staff members, locations and types of services and also help to reduce churn while collecting valuable customer data and improving customer communication.

An online booking system also reduces administrative workload for your team, so they can focus on customer service or the actual appointment.

But when you're accustomed to the traditional system of phoned-in appointments and paper calendars, it can seem overwhelming to transition to a more modern online scheduling

tool. So here we share the online appointment scheduling best practices you need to keep in mind when implementing this software for your medical practice, as well as the benefits of online schedulers.



feel encouraged to keep appointment when online booking platforms are used!



Boom! Let's get into the fun stuff!

02. Best Practices for Online Booking



Dashboard

Staff & Resources

Services

Appointments

Customers

Integrations

Communication

Video Room

Settings

NOTIFICATIONS >

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Long Consult 30 min

This is a multiple choice question

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A Option one here

B Option two here

C Option three here

D Write another option here

healthline

2.1. Implement patient self-scheduling

It takes a patient approximately [8 minutes to schedule an appointment](#) by phone, and this time increases for those practices that need to gather specific patient information during the booking process. It might not seem like a lot initially. But multiply that by the patient calls for each doctor in each department of your practice, and suddenly a massive chunk of your team's working days are taken up

fielding phone calls.

Thankfully, the technology of today has advanced to the point that you can give patients all the tools they need to schedule and manage their own appointments directly through scheduling software. And as customers get more used to technology, it becomes increasingly important to the success of any business to apply the scalable practices that self-scheduling allows for.



Do patients prefer online scheduling?



60%

of patients prefer online bookings

Another study from 2021 shows that 59-70% of patients prefer self-scheduling — perhaps it is time to give them what they want. Leveraging your website or text messaging are both highly convenient ways of providing self-scheduling services to patients, as they don't require downloading apps or logging into a third-party portal.

Upvio enables you to conveniently share your customized web page address with your patients via email, text, messaging apps and social media. The simple fact is that self-scheduling software improves your employee's productivity and also increases overall patient satisfaction.



2.2. Set up an omnichannel reminder system

Every medical facility knows the frustration of dealing with no-shows or last-minute cancellations. Not only can it be costly and inconvenient to your practice – when you have a busy practice with an active waiting list, that unexpectedly open slot can feel like a waste of time. It is also just good practice to remind patients about their appointments, as it provides them with peace of mind that their appointment slot is actually booked. It is best to automate this reminder system, as your own staff can get

busy and not have the time to call or message a patient ahead of their appointment. Or they, like any other human, can simply forget. By using a multi-channel reminder system that incorporates both SMS or text messaging and email, you're also increasing the odds that your patient will see and respond to one of the reminders.

For this reason, it is best to ensure that appointment reminders give your patients the ability to cancel or reschedule their appointments.

The reminders should also include



Physician or healthcare practitioner's name



Appointment date and time



Location (whether online or in-person)



Anything the patient needs to do before the appointment such as fasting or drinking liquids



Details about your cancellation policy

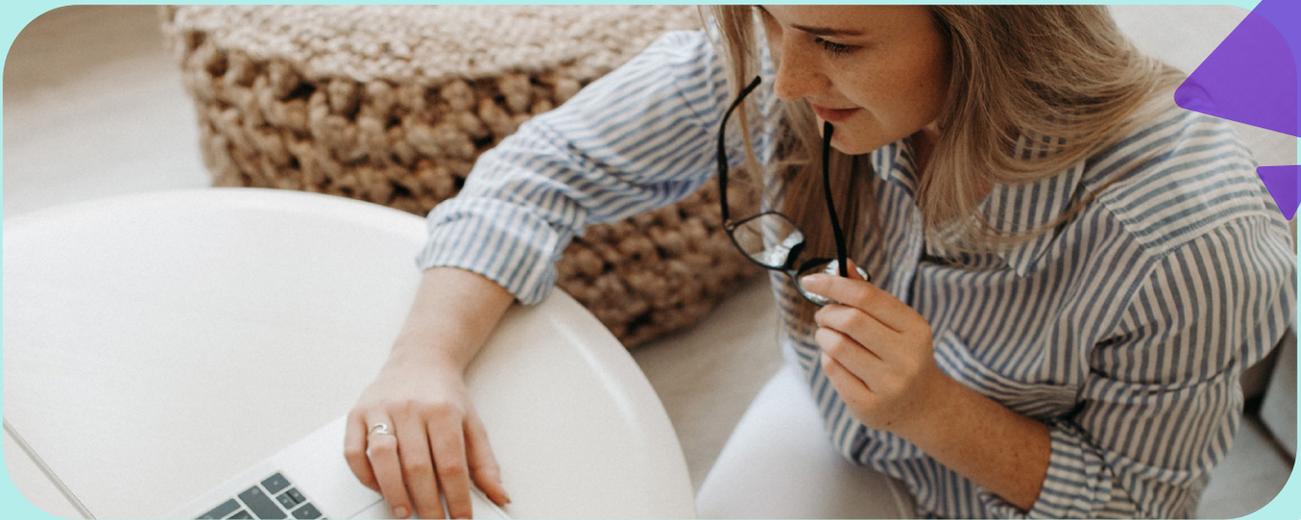
2.3. Avoid double bookings with tools that integrate across platforms

It is common practice for businesses like healthcare providers that experience a high volume of last-minute cancellations and no-shows to use a double-booking system. This helps busy practices with long waiting lists be more efficient, but it can also lead to frustrations on those rare days when every patient shows up for their appointment on time.

But with online booking systems that are deployed across multiple channels – this can happen purely by accident. And that will lead to even more frustration, as well as

patients being so dissatisfied that they look for another healthcare provider. So, ensure that the scheduling solution you choose integrates with all the platforms where patients can schedule an appointment and syncs across all calendars of your staff and practice.

And also implement processes and systems that help streamline your services, such as seeing a second patient while the first is off getting x-rays, or having your nurses handle the entire intake/aftercare process.



2.4. Integrate a solution take payments during booking process

Most healthcare providers work on a payment-by-appointment system. So, it is a good idea to integrate trustworthy payment options with your system. Be clear about the prices of your services and payment options to help your patients make an informed choice. Remember that your payment solution needs to include a system for refunds for those patients who have to cancel their appointments

for any reason. This information should also include information and details about your cancellation policy and what, if anything, will be deducted from the upfront payment before a refund is processed.

Taking full or partial payments at the point of appointment scheduling can lead to higher patient compliance so don't neglect this tip.

2.5. Use customized forms to gather relevant patient information during scheduling

Standardization is a key element of scaling your appointment scheduling and support services. Things like customized forms for gathering relevant information integrated with your scheduling platform, a built-in system for prioritizing appointments and links to FAQs all help you streamline your appointments and improve your productivity.

Standardized forms for the appointment booking stage can

have fields that include contact details and other personal data your practice needs for the appointment. You can also have people answer a series of standardized questions that make it easier for you to create action items, verify what needs to happen during the appointment and arrange specific details.



Initial information to collect includes things like:

- ✓ First name
- ✓ Middle name
- ✓ Last name
- ✓ Date of birth
- ✓ Phone
- ✓ Email
- ✓ Address
- ✓ First visit?

Appointment information for first and subsequent calls:

- ✓ Date
- ✓ Time
- ✓ Physician name
- ✓ Procedure
- ✓ Reason for appointment?
- ✓ Level of urgency



2.6. Introduce an automated queueing system

No matter how efficient your scheduling system is, late cancellations and no-shows are an inevitable part of running a medical practice. But you can mitigate their negative effects by keeping an active waitlist of patients who would like to get an earlier appointment than their scheduled one. Manually contacting each of these patients one by one would be time-consuming, so this system should be automated.

A system that allows you to send out mass texts informing your current patient waitlist that there is an open slot available for a limited time is the best option. An automated queueing system that displays available slots in real time to other patients in the process of booking their appointment is another way to decrease walkaway times, missed appointments and long wait times.

2.7. Have a clear understanding of your requirements and pick the right tool

Your practice has specific requirements which your future online booking software needs to be able to support. Make sure you talk to your staff and colleagues to compile a list of features and

requirements your new tool really needs to satisfy.

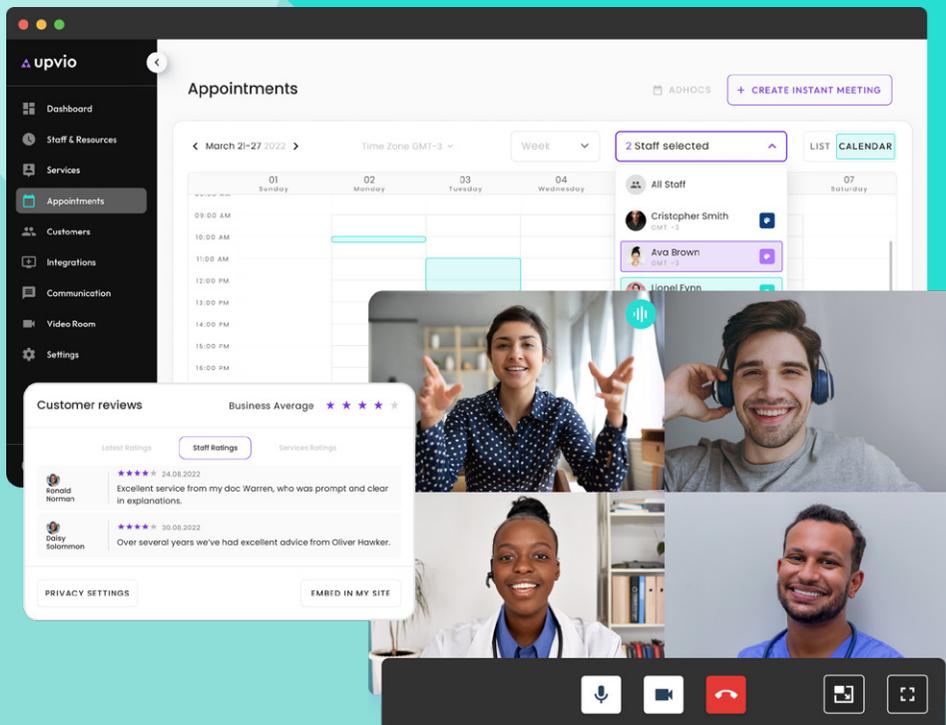
Then start reviewing tools and make sure they meet your specific needs.



Here are some of the key requirements we see when working with thousands of practices:

- ✓ Customize settings for each staff member
- ✓ Support physical and virtual locations
- ✓ Ability to run multiple locations through one account
- ✓ Support multiple time zones
- ✓ Customizable notifications for SMS and email reminders and follow-up
- ✓ Customizable bookings page to represent your branding
- ✓ Integrate with online payment providers like Stripe and PayPal
- ✓ Integrate easily with video consultation tools, ideally within the same software tool
- ✓ Custom intake forms

03. Benefits of Online Appointment Scheduling Software



3.1. Patients can schedule appointments 24/7

When you change your appointment scheduler to an online service, you are making yourself more available to your patients. The world today is hyper connected and always on the move. That means your patients often don't have time to make appointments during normal office hours.

In fact, one study found that [59% of respondents](#) are frustrated with being put on hold and how inconvenient office hours related to scheduling appointments by phone are. When [40% of online](#)

[bookings](#) are made after hours these days, not having an online appointment booking system that is available 24/7 can have a significant impact on your bottom line.

Of course, you could pay for a call center to reply to after-hours queries, but software that integrates with your website is a lot cheaper. And by adding an FAQ section to your website and/or booking process, you can also reduce the time your employees have to spend answering those questions that patients ask most.





3.2 Increase the productivity of your staff

We've already mentioned how much time staff can spend each day on taking appointments by phone. Other situations that can also take a lot of unnecessary time are phone calls from patients with a series of common questions, the initial appointment intake process, handling payments and payment queries and more.

With a robust patient scheduling solution, you can avoid your employees spending all their time on tasks that can easily be automated. The reduction in miscommunication between

departments or when patients are referred from one doctor to another alone can save your staff a ton of time and allow them to focus their attention on other administrative tasks or customer services.

Design a booking process and appointment reminders that include answers to your patients' most common questions, as well as prevent the 'doubling' of work – like a patient filling in a paper form that then has to be digitally captured by your staff.



3.3. More data and improved insights

The increasing popularity of online tools and their ability to gather mountains of relevant data gives every business a huge opportunity to improve the knowledge they have about themselves. While you may notice certain trends in your practices booking with traditional approaches, confirming that you tend to get more canceled appointments on Fridays would involve a lot of work on your part.

With an online booking system, there are usually a number of integrated tools that allow you to generate reports based on a huge variety of information that

they automatically gather. Such information may be things like when your peak business hours are, which types of patients (i.e., referrals, returning patients, first-time patients) are most likely to miss appointments, and which days or times you have very few booked appointments.

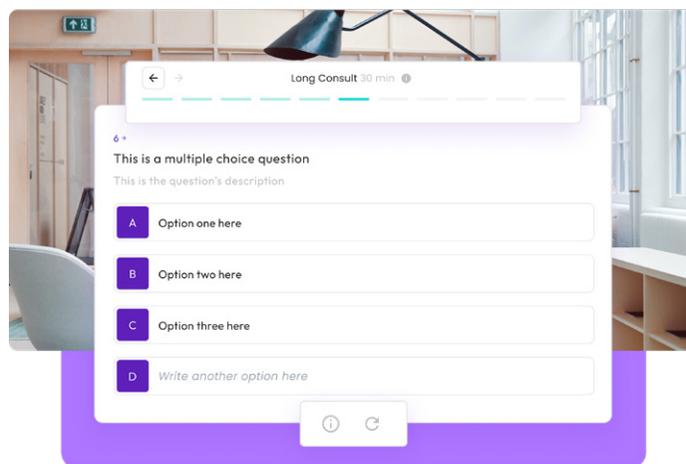
This information helps you plan for and adjust to what your patients need more efficiently, and that in turn leads to patients who are happier with the care they are receiving from you and your practice. This helps your bottom line.

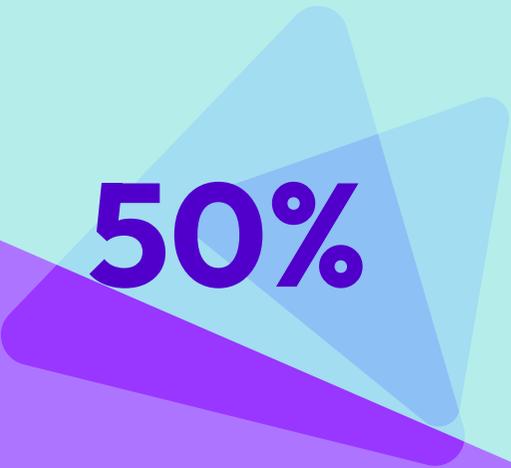
3.4. Use Appointment Scheduling Software that caters to your needs

At the end of the day, a successful practice is one that makes and keeps its patients happy. Healthcare may be an essential service, but if your practice is not doing everything it can to improve patient satisfaction, then they are liable to find another provider.

An online appointment system allows you to achieve that higher

rate of successful appointments that translates into happier patients and higher profits for your practice. Upvio at its core is here to enable all staff members of the practice team to get their job's done more efficiently and gain more time for patients and ultimately for themselves rather than dealing with unnecessary admin.





50%

of clinicians cited administrative burden as the top thing they would change about their jobs if they could, beating out the second-most cited thing - more flexible work schedules (29%).

With the Upvio Scheduler, you get a secure, HIPAA and GDPR compliant online booking software that makes it easy to manage multiple calendars across different staff members, online and in-person locations, offices, teams and even time zones.

It's a full-service online appointment scheduling system that is designed for medical teams of all shapes and sizes. Super easy to set up by doctors and front desk staff alike.



If you're interested in finding out more about how this award-winning HIPAA and GDPR-compliant platform used by thousands of practices from every corner of the world can help you streamline your booking process...

Contact us →

to get a demo or watch this always-on demo or hey just give Upvio a try with our **free trial**.



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