1

TECHNOLOGY CHECK

- Check your **TECH –** Ensure the recall and reminder settings are ON
- **Ensure** your patient communication system is **functioning correctly**
- Evaluate Your Reactivation/Recall/Reminder Settings
- **Reach out** to your patient communication system or your consultant for further assistance
- **Maximize the use of the technology** (i.e. newsletters, create groups, send direct messages)
- **Assign a patient communication facilitator to monitor and manage** on a daily basis

2

SCHEDULE REVIEW

- **Review your schedule for the year ahead**
- Focus on filling any gaps identified
- **Recall patients not seen in the last couple of years** to fill your schedules
- **Use email, direct messaging and personal calls –** whichever works for your office, just do it
- **Implement online scheduling**
- **Assign coordinator** to manage

3

INTENTIONAL RECALL

- **Evaluate** your **Medical Recall** process
- Recapture patients that are due for **medical testing** due to eye disease
- **Generate patient reports based on medical diagnosis**
- Let your **clinical team** take action to help fill the schedule

4

ENHANCE MEDICAL

- **Assess and evaluate your coding –** do not leave the money on the table
- Review your **clinical care guidelines**
- **Educate** and review this information with your team
- **Enhance your medical technology;** take advantage of the deals and make a plan to implement
- **Enhance** your **visual screening** protocol
- **Assign coordinator** to manage

5

ENHANCE MARKETING

- Understand marketing and how to **educate your patients**
- **Communicate** with your patients
- **Be present. Be active.**
- **Enhance** your social media efforts; **be active** in the community
- **Review** family member conversion and shopper conversion communication
- Share available appointments with your patients and on social media

INFORMATION

Key Objectives

- Strategically plan and prepare for the year
- Review your strategy; outline and understand the steps you need to take
- Check your tech and focus on filling the gaps
- Understand the meaning behind Intentional Recall
- Review or establish your Clinical Care Guidelines
- Enhance your marketing efforts and community outreach
- Ensure your team understands the strategy and the end goal

As a reminder, all of the steps listed in How to Fill a Patient Schedule Gap are enhanced actions for what you already speak to ensuring you are doing within your practice. Begin implementing these actions and continue to follow these protocols whenever necessary to fill a gap.

Recommended OSC Courses

Patient Scheduling Optimization
Building a Patient Schedule Template
Treasure Hunt – Get Paid Properly for the Work You Do for Your Patients
Unveiling the Mystery: Insurance and Billing Best Practices
Unveiling the Mystery: Interpreting Reports & Optimizing Reimbursements
Preliminary Testing Part 1: Common Procedures and Instrumentation
Preliminary Testing Part 2: Additional Patient Workup and Etiquette
Clinical Workup for Emergency, Urgent, and Priority Office Visits

NOTES

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Resources

SolutionReach Blog - https://www.solutionreach.com/blog

SolutionReach Support - https://www.solutionreach.com/about/contact-us

Weave Blog - https://www.getweave.com/blog/

Weave Support - https://www.weavehelp.com/support

INFORMATION