

## Oregon clinic redesigns patient registration to save clicks, time

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When a practice ditches paper registration forms and designates a team member to orally collect information prior to the visit, patients spend less time trying to understand the process and they answer questions pertinent to their visit more accurately. As a result, physicians and others on the care team are freed up to spend more time on the patient's visit. Physicians also are more likely to begin the visit with the patient's complete medical history, which is essential to efficient, accurate and effective care.

As new-patient volume rose at Asante Physician Partners Family Medicine in Grants Pass, Ore., practice leaders realized that the six-page registration packet they required patients to complete before their first visit was complicated and inefficient.

"Too many patients were arriving without complete registration paperwork, which delayed not only their visit but also had a trickle-down effect on the next visits on the schedule," said David Gilmore, who directs operations for the Southern Oregon practice and holds a Lean Six Sigma Black Belt certification. "The care team was documenting items in the exam room that should have been covered before the patient arrived. This process created time and cost concerns for both the patients and medical practice."

To improve the process, practice leaders decided to transition to an all-electronic pre-registration system, a strategy highlighted in an AMA STEPS Forward™ module.

Asante leaders estimated they would register 1,000 new patients over the next two years and concluded they needed two full-time employees to support the new pre-registration process. When they compared the cost implications of staying with the paper-based registration versus the all-electronic system, they estimated the seven-physician practice would save as much as \$216,760 annually by switching to the pre-registration system.

It took about a month to implement the new process. Asante built the electronic pre-registration process into the routine and trained the entire team on an ongoing basis. Team members learned what the process would entail and how to accurately enter the relevant patient details. They also learned how to measure and report on progress. A new patient coordinator speaks with patients in person or over the phone to collect information before the first visit, including their medication list, allergies and medical history. The information is entered directly into the electronic health record (EHR) to help ensure that the patient record is accurate and complete.

Once in full swing, Asante leaders discovered that physicians, nurses and medical assistants (MA) no longer took time away from the patient visit to collect and enter missing information. After their success in Grants Pass, Asante expanded the process to the more than 20 practices in its network.

The AMA's STEPS Forward module summarizes a four-step process your practice can follow to implement its own pre-registration process.

**Design your pre-registration process.** Understand your current registration process so you can incorporate pre-registration into the workflow. Under the new system, all registrations are entered into the registration software and EHR. There are no paper forms. Decide as a team what you want to collect during pre-registration.

**Develop a pre-registration script.** Help guide the conversation between the new patient coordinator and the patient. The script should match the fields in your registration software and EHR so that the data entry is quicker and more accurate. Use the script as a training tool. Laminate a copy and post it near the phone as a reminder of what needs to be asked.

**Identify and train staff.** Find employees with exceptional customer service and telephone skills who also know your practice registration software and EHR. This could be a current MA or patient-service representative, or a nurse may be a more natural fit depending on your specialty and the complexity of your patient panel.

**Roll out the new process, gather feedback.** Start the process with new patients who still need to be scheduled. If there is time, reach out to new patients who already have appointments. Get feedback from physicians, nurses and MAs about the quality of the clinical information collected during pre-registration and use the feedback to improve the process.

The pre-registration STEPS Forward module has more detailed information on how you can save time for the patient and your medical team by incorporating a pre-registration process. It also provides tools to help guide you through the process.

This module may be completed for continuing medical education credit. There are seven new modules now available from the AMA's STEPS Forward collection, bringing the total number of practice improvement strategies to 43; several thanks to a grant from, and collaboration with, the Transforming Clinical Practices Initiative.