New Patient Coordinator

How can you increase efficiency while limiting contact for patients and staff?
Maybe consider a version of this.

Establishing the role of **New Patient Coordinator (NPC)**

This person (or individuals trained to perform the same function) serves as the primary liaison to the practice for new patients and referring physicians, working in conjunction with scheduling and clinical staff to improve efficiency and work-flow.

How it works

- During initial appointment scheduling (with administrative staff or call center), basic information is obtained and entered into the E H R (to include):
  - Patient given name (exactly as displayed on insurance card)
  - Date of birth
  - Insurance(s) and ID number(s)
  - Primary Care Physician/Referring provider or source
  - Reason for visit
- Prior to ending the initial call, the scheduling team member politely requests that all intake paperwork be completed and submitted prior to visit (or brought in completed at time of visit).

Scripts are important (for every staff role)

"Mr. Green, we ask that you either complete and submit your intake paperwork ahead of time OR if you prefer, we can set up a pre-visit interview with our New Patient Coordinator. This allows us to keep wait times down and to limit contact with other patients and staff members.

If the patient chooses to complete paperwork on their own, an email is sent immediately following the call with portal log in instructions or a direct link to your website.

A very small % of practices have patients who log in to the portal and COMPLETE all required info

During the pre-visit interview, all remaining demographic and clinical information will be recorded directly into the patient's chart including:

Confirmation of reason for visit/chief complaint

Personal and family medical history

Medications and allergies

Vital Signs

Most MIPS measures (Height, Weight, Smoking Status, Immunizations, etc.)

Financial policy, HIPAA and consent to treat will need to be signed at the time of visit (if forms are not completed via the portal)

For Commercial Payer patients

- **The NPC** could also perform insurance eligibility and benefit checks (to determine active coverage, copay, deductible and other out of pocket expenses that may be incurred). Information obtained will be discussed during the phone interview or in addition to the reminder communication (in order to inform and prepare patient for any monies that may be owed during visit).

Additional NPC Tasks

The NPC is responsible for following up/rescheduling missed new patient appointments and after 2 no-show incidences communicating with referring providers via professional communication (documenting the practice's efforts in coordinating care).

The NPC ensures that patient updates and consult visit notes are e-faxed to PCP/Referring providers within one week of new patient visits or procedures.

What else could an NPC or PC; patient coordinator do for you to increase efficiency?