

# The Checklist of Everything You Need to Run Your Practice Better

To achieve a positive and seamless patient experience, it's essential to have the right tools and processes in place. Prioritizing a positive patient experience not only improves patient satisfaction and engagement but also contributes to the overall success and reputation of your healthcare practice.

By following this comprehensive checklist we've put together, you can effectively address all stages of the patient journey at your practice!

## Before the Visit

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The pre-visit leg of the patient journey is all about making it easy for patients to schedule their visit and ensuring they know what to expect when they get there.

Here's what you'll need:



### **Appointment Scheduling System**

To quickly check for openings and schedule patients with their preferred provider.



### **Automated Appointment Reminders**

To remind patients of upcoming appointments and reduce no-shows.



### **Insurance Eligibility Checker**

To determine what appointment-related costs a patient's insurance policy will cover.



### **Patient Cost Estimator**

To calculate a patient's estimated financial responsibility, so they're not surprised by unexpected costs.

## During the Visit

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Okay, now you've got your patient in the office. It should be as easy as possible for them (and you) to check in, pay their appointment costs, and get into the room with their provider.

Once they're in that room, their provider must have easy access to their health information to ensure they can provide the best, most thorough care possible.

Here's what you'll need:



### **Credit Card Processor**

To accept debit and credit card payments at the front desk, allowing patients to pay quickly and easily, avoiding any financially related stress.



### **Payment Plan Setup**

To offer the flexibility of a custom payment plan to patients who have a high deductible or high coinsurance and may not be able to pay their full bill at their appointment.



### **EHR Solution**

To optimize the time patients spend with providers by providing easy access to their electronic health records. Your EHR solution should integrate with your practice management software for convenience, flexibility, and efficiency during (and after) an appointment.

## After the Visit

Just because a patient has left the office doesn't mean their journey is over. Continue to deliver an experience that keeps them engaged and coming back by making it simple for them to do things like pay their medical bills and access health plan information after their visit.

### Here's what you'll need:



#### **Charge Capture Solution**

To allow providers to easily record services performed and quickly generate a superbill, shortening the billing cycle. Your charge capture solution should integrate with your practice management software to ensure a smooth and efficient billing process.



#### **Electronic Claim Submission**

To quickly submit claims and have clear visibility into their status.



#### **Claim Scrubber & Tracker**

To facilitate quick claim analysis and editing as needed and get more claims accepted the first time.



#### **Patient Portal**

To give patients access to their visit history, health information, and medical bills.



#### **Automated Patient Statements**

To send billing statements faster and via a patient's preferred method (text, email, or print mail).

## CollaborateMD: A Patient Experience Solution That Checks Every Box

CollaborateMD's [practice management software](#) has you covered throughout the entire patient journey, from making that first appointment to ongoing care. Let us help you work less, get paid faster, and provide your patients with the ultimate engaging healthcare experience.

[Book a demo](#) to learn more about our solutions today!

