

Access Rounding in the Reception Area

The purpose of this tool is to help create dialogue and insight with our patients regarding their experience with us. This is designed to be used in the reception area, but it is not limited to only that area of the clinic.

Please plan time daily to converse with our patients, weekly at a minimum. This helps to not only put our patients at ease while waiting but also shows them that we truly value their feelings and experiences with us. Be sure to document patient responses to each question and follow up with any issues brought to your attention. Conduct rounds in your clinics or coordinate with another manager to round inside their practice. When conducting rounds outside of your clinic, be sure to schedule in advance, notifying managers when you will be attending. Do not forget to share with the clinic leader what you learned from the patients if you are visiting another clinic. Plan to speak about these conversations on the manager huddle and in your 1:1s with your director.

You do not have to limit your conversation to these questions; however, these questions will help provide insight to you as the leader. This tool can provide opportunities for change and for spotlighting wins. Think of this as real-time survey comments.

Be open to speaking with the patient about whatever they need to share. Always thank them for their time. Finally, have fun connecting with our patients!

Instructions:

1. Introduce yourself and your role. Ask the patient if they would be comfortable to speak with you for a few minutes. "Hi, my name is ___, and I'm the practice manager. I value the experience of our patients, and I would like to ask you some questions. Would you be willing to talk with me for a few minutes?"
2. Thank the patient for giving you their time. Sit in an eye level position with the patient, ensure phones and other distractions are put away, and record the date, time, and provider seen (if comfortable). Start with asking questions, but do not limit yourself to only these questions. Allow the conversation to happen naturally, especially with patients who like to share. Document their responses on the template provided.
3. Thank the patient for their feedback and time. Remind them of the survey they will receive and explain that they can reach out if there is anything else that they need. "Thank you for taking the time to speak with me today. It was a pleasure to visit. Just to let you know, you may receive a survey via text message regarding your visit today. If you would please take a few minutes to fill it out, we can continue to improve and provide the best experience possible. If there is anything else you need, do not hesitate to contact us anytime. Have a wonderful day!"

Access Rounding in the Reception Area

Date: _____ Time: _____ Provider (optional): _____

1. Were you able to get in to see us at a time and date convenient for you?

2. Did you have a positive experience on the phone and were you able to get through timely when you called us?

3. How easy was it for you to schedule an appointment?

4. How welcomed did you feel when you came into the clinic today?

5. Do you have any feedback on what we can do better?
