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# Appointment scheduling to improve your bottom line

**A patient calls the office to schedule an appointment. You confirm an appointment time and record the patient's name and specific reason for the visit. Imagine the impact you could have on your physician office's bottom line if, instead of ending the call, you:**

- Accurately record the current insurance information your office requires to confirm the patient's insurance eligibility and co-payment information before the patient visit;
- Collect the patient's preferred contact information to allow your office to make an appointment reminder call to reduce the chance of a no-show; and
- Review the office's payment policy with the patient and confirm the payment due at the time of the visit.

Obtaining basic patient information before a patient's visit can improve the office's administrative efficiency. It is a good practice to verify current insurance information with all patients. The patient's contact and insurance information may well have changed since the last visit and thus may need

to be updated. Consider using a patient information sheet to assist in collecting specific patient data. This information can help the office staff confirm that:

- The patient's insurance coverage is up-to-date;
- The patient understands the co-payment and deductible due at the time of visit; and
- Appropriate referral and medical records are available.

The collection and confirmation of the personal and insurance information for each patient should be completed before the scheduled office visit. This information will positively affect the office's bottom line by assisting with:

- Accurate and timely submission of the medical bill/claim; and
- Collection of the patient's payment (ie, co-payment and deductible).

The questions listed on the reverse side of this flyer are provided as educational material for front office personnel who answer the phone and schedule patient appointments. Physician offices may wish to review the questions and tailor them to meet their specific needs and procedures.

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## Ten questions to ask patients when scheduling an appointment

**1. What is your full legal name and how is it spelled on your insurance card?**

To verify insurance coverage, the health plan or payer requires the patient's full legal name and the correct spelling as the name is listed on the patient's insurance card.

**2. What is the reason for the appointment?**

This information is needed to determine the length of visit, physician assignment and other office services, such as x-rays or lab work, that should be available for the patient.

**3. When was your last visit to our office?**

Collect accurate patient contact and insurance information for a new patient and for any patient who hasn't visited the office recently. It is a good practice to verify current insurance information with all patients. The patient's contact and insurance information may well have changed since the last visit and thus may need to be updated.

**4. What is the name of your health insurance company, insurance identification number and group number listed on your insurance card?**

The patient's insurance information is necessary to verify that the patient has current insurance coverage and to obtain the amount of the co-payment and deductible due at the time of the visit. Check with your billing staff to ask what additional information, such as the patient's birthday, may be helpful for them to verify the patient's insurance coverage.

**5. Is the patient a minor? If so:**

- Whose insurance plan covers the patient's health care and how is the name spelled on the insurance card?
- Does another person (such as the other parent) also carry insurance on the child?
- Who is responsible for the child's health care decisions?
- Who will accompany the child to the appointment and what is their relationship to the child?

If the patient is a minor, an adult should accompany him or her to the appointment. It is important to know who that person will be before the visit. It most likely will be a parent, but situations in which parents are divorced can create issues for the office that should be addressed up front.

**6. What is your (or patient's responsible party's or legal guardian's) phone number at work and home? Which phone number would you prefer the office to use when contacting you?**

The office may need to contact the patient for an appointment reminder, as well as treatment, billing or administrative questions.

**7. Are you being referred by a physician or physician office? What is the physician or other provider's name and phone number?**

Your office might see many patients who have been referred by other physicians or medical providers. It is important to know the name of the referring physician and how to reach that physician in case records, orders or other information must be obtained from his or her office.

**8. Should specific records or test results be available for the patient visit?**

Knowing what test results, x-rays or other patient records might be necessary for the visit helps to ensure the information is available when the physician sees the patient.

**9. Are you familiar with our office policies?**

Your office may have specific instructions to provide to anyone who calls for an appointment. These instructions might include information such as:

- The patient should arrive 20 minutes prior to the appointment to fill out any necessary paperwork.
- The office has a no-show and cancellation policy.
- The patient should bring any of the following that are in his or her possession:
  - Medical records;
  - Immunization records;
  - A list of medications being taken; and
  - Co-payment information.
- Mention any amount the patient might owe from previous visits and tell him or her to make that payment during the next visit.

**10. Do you have any questions?**

If the patient has a treatment- or administrative-related question you are unable to answer, make a note of it and follow up with the person in the office who can best answer the question. Then call the patient back with the answer before his or her appointment. This is an excellent way to impress patients with the office's efficiency and professionalism.