



## Order-Based Scheduling: Scripting for Check-Out

**When checking out patients who are enrolled in Patient Gateway and whose appointment type generates a ticket, use the following scripting at check-out:**

Great. We have a new process to find the best appointment for you.

- We want to make sure you are scheduled for a date and time that works for you and your provider.
- We have found that when we schedule too far in advance, patients and providers are more likely to have a need to reschedule.
- Instead, we have you select your appointment about 2 months prior to the visit.
- Here is how it works. Today is \_\_\_\_\_, so I have programmed the scheduling system for you to receive a link in your email and in Patient Gateway the week of \_\_\_\_\_ (2 months prior to expected appointment month).
- You can click on the link in your email, which will take you to Patient Gateway.
- The link allows you to select a date and time in the month of \_\_\_\_\_ .

Do not worry — your spot is reserved.

- In addition to sending you the email, we monitor the scheduling system daily.
- We will call you if we see you have not picked your preferred appointment day and time and will ensure that you are scheduled.

If after going through the scripting, the patient still wants to schedule at the point of check-out, you may schedule them. Always use your discretion in order to provide the best patient experience.

**When checking out patients who are *not* enrolled in Patient Gateway, use the following scripting at check-out:**

Great. We have a new process to find the best appointment for you.

- We want to make sure you are scheduled for a date and time that works for you and your provider.
- We have found that when we schedule too far in advance, patients and providers are more likely to have a need to reschedule.
- Instead, we have you select your appointment about 2 months prior to the visit.

Encourage the patient to enroll in Patient Gateway—but assure them either way, we will call them to schedule their appointment.

- I see that you are not currently signed up for Patient Gateway. I can help you enroll today, so you will be able to schedule your follow up appointments online.
  - Here is how it works. Today is \_\_\_\_\_, so I have programmed the scheduling system for you to receive a link in your email and in Patient Gateway the week of \_\_\_\_\_ (2 months prior to expected appointment month).
  - You can click on the link in your email which will take you to Patient Gateway.
  - The link allows you to select a date and time in the month of \_\_\_\_\_ .

If patient says they are not interested or do not have time to enroll:

- It is fine if you are not interested in signing up for Patient Gateway today. You can always enroll in the future, when you would like the option to schedule follow up appointments online.
- In the meantime, we monitor the scheduling system daily. We will call you to set up your appointment 2 months prior to your visit.

If the patient does sign up for Patient Gateway say:

Do not worry – your spot is reserved.

- In addition to sending you the email, we monitor the scheduling system daily.
- We will call you if we see you have not picked your preferred appointment day and time and will ensure that you are scheduled.

If after going through the scripting, the patient still wants to schedule at the point of check-out, you may schedule them. Always use your discretion in order to provide the best patient experience.

**When checking out patients who are enrolled in Patient Gateway and whose appointment type does *not* generate a ticket, use the following scripting at check-out:**

Great. We have a new process to find the best appointment for you.

- We want to make sure you are scheduled for a date and time that works for you and your provider.
- We have found that when we schedule too far in advance, patients and providers are more likely to have a need to reschedule.
- Instead, we have you select your appointment about 2 months prior to the visit.

Do not worry – your spot is reserved.

- We monitor the scheduling system daily. We will call you to set up your appointment 2 months prior to your visit.

If after going through the scripting, the patient still wants to schedule at the point of check-out, you may schedule them. Always use your discretion in order to provide the best patient experience.