Successful Online Scheduling in 5 Steps

How to Deliver Self-Service Convenience
to Consumers and Reduce Burden of Staff

5 Key Steps to Successful Online Scheduling

Healthcare consumers have made it clear that they want to be in the driver's seat when it comes to how they find, select, and access care—and they expect convenient and flexible self-service options when their journey to care takes them online. With over 60% of consumers turning to the internet when they need to find a new provider or service, healthcare organizations must continue to innovate to meet these high consumer expectations and set themselves apart in an increasingly competitive market.[1]

What's more, over 40% of consumers—including 55% of millennials—say they'd prefer to book their medical appointments online, a trend that has held true for the last three years and underscores the real demand for digital self-service.[2] However, despite growing consumer preference, less than half of the top US News and World Report ranked hospitals offer online scheduling—contributing to a major gap in patient access.[3]

While meeting consumer expectations and needs for care are clearly high priorities for healthcare organizations, they aren't the only stakeholders to consider when it comes to self-service online scheduling. Providers also play a critical role here, with 96% expressing high interest in the opportunity self-service scheduling offers (+30 percentage points since 2019) across appointment types and channels.[4] With both patients and providers showing marked interest—it's time that your organization begins the journey to launch online scheduling.

Providing the option for patients to book appointments through digital self-service is more than just meeting consumer preferences. It's also a smart way to reduce the burden on call centers—many challenged by workforce shortages and budget cuts—by diverting volume to other channels. A recent study found that less than half of patients successfully booked an appointment on their first call into a healthcare organization—creating a frustrating experience for patients and often resulting in additional calls, taking up more time and resources within an access center.[5] In addition, offering online scheduling gives consumers the flexibility to book appointments when it's convenient for them, even if that happens outside of normal business hours when call centers are closed or lightly staffed.

With the right strategy and solutions in place, organizations can easily make online scheduling a reality. Use the following best practices as a guide to ensure a smooth roll-out across your organization:

This guide covers the importance of each of these, as well as key takeaways to consider during each step along the way.

1	Establish a single source of truth for provider, service, and location data
2	Engage cross-functional stakeholders across your organization
3	Create a standardized, repeatable launch plan
4	Broaden booking options across specialties, appointment types, and services
5	Optimize and expand upon self-service capabilities

1 Establish a Single Source of Truth For Provider, Service, and Location Data

As demand for online scheduling is strong among both patients and providers, expectations for a smooth launch of a self-service experience are similarly set at a high bar. However, before launching an online scheduling solution, organizations must first establish a solid data foundation to support it.

Leverage a Centralized Directory: Building a centralized provider data management system that serves as a "single source of truth" is a critical first step to any digital patient access initiative, especially online scheduling, which is reliant on both accurate provider and appointment availability data to help consumers feel confident that they are booking the right provider in an open time slot. To do this you must first reconcile all the data related to your providers, services, and locations—which is likely maintained in multiple departments and in various formats across the organization—and determine what the most reliable source is for key elements (e.g., credentialing for provider specialty, EHR for appointment availability). Once all of your data has been aggregated into a single source of truth, establish a maintenance process for it over time to ensure continued accuracy.

Build Out Robust Provider Profiles: Creating accurate, differentiated provider profiles is a far more manageable task once a single source of truth for your organization's data is in place. Data quality is important here to help ensure your provider profiles include the elements that matter most to consumers when selecting care—such as clinical expertise, appointment availability, and insurances accepted. Surfacing this level of detail in provider profiles supports patient satisfaction, aligning their unique clnical needs and personal preferences, and builds trust with providers as they start to see their panels filled with patients who are the best clinical fit for their practice. As an added benefit, including certain key elements in provider profiles can boost demand conversion.

Top Three Provider Profile Element's Impact on Conversion[6]

Patient Ratings & Reviews	**5x** Higher Conversion
Appointment Availability	**5x** Higher Conversion
Designation of Clinical Keywords	**4x** Higher Conversion

Establish Key Business Rules: With a single source of truth and robust provider profiles in place, you'll want to decide how data and information are surfaced to consumers based on your business goals and objectives. For example, you may want to apply certain rules to ensure that your employed provider base is prioritized in search results above affiliated providers, while still ensuring the most accurate clinical match for consumers. Additionally, you can leverage role permissioning and workflow approvals to allow certain users the ability to edit profiles but also maintain control over what gets published externally. For larger organizations that have more complexity, consider setting up a smaller group that will have final say over business rules, approving profile changes, and keeping tabs on scheduling updates.
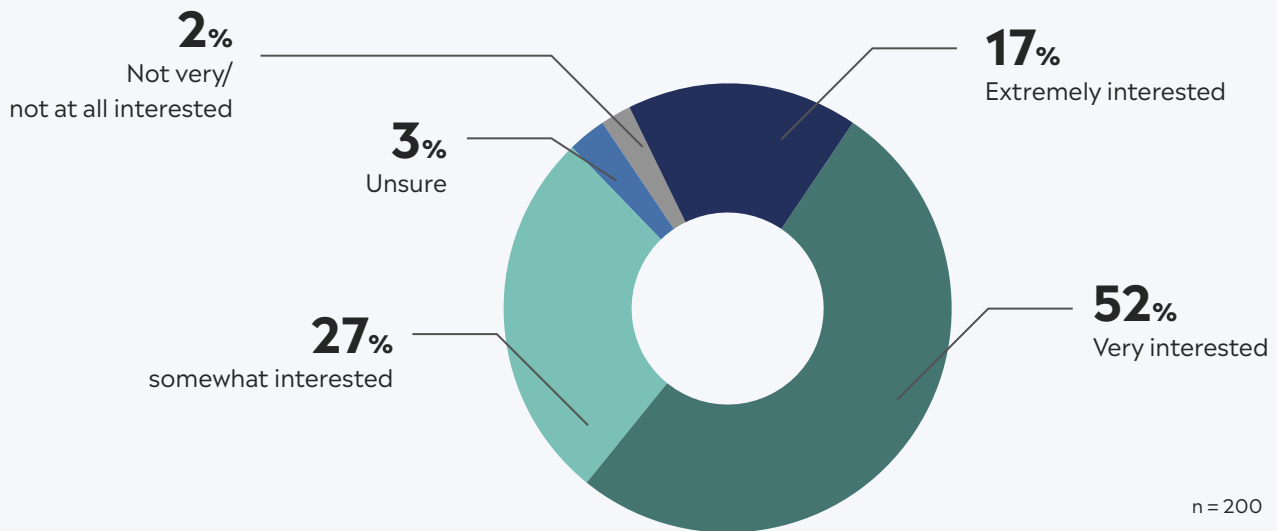
Engage Cross-Functional Stakeholders Across Your Organization

Engaging stakeholders early and often to build champions and garner support across your organization will contribute greatly to the success of implementing an online scheduling solution.

Identify Stakeholder Champions: To make sure your online scheduling solution launch is smooth you'll want to have all the necessary support from different departments and leaders that might be involved—such as marketing, IT, and clinical operations—from the start. Be sure to clearly outline roles, responsibilities, and issue escalation processes with this group. It is also beneficial to develop goals and key performance indicators (KPIs) cross-functionally that will guide you moving forward as you begin to measure success with the project. Completing this work at the start will help save you valuable time during the implementation process by allowing decisions to be made more efficiently and providing clarity across teams.

Gain Provider Buy-In: It is especially important to engage clinicians as stakeholders during this process and ensure that they have a prominent seat at the table. As mentioned previously, 96% of providers say they are interested in online scheduling.[7] And of those providers, about half (48%) believe offering online scheduling helps keep existing patients in-network, while 42% say it helps them attract new patients.[8] Giving providers input into something that heavily affects their day-to-day workflow will build trust and provide reassurance that they still have control over their own schedules—one of their biggest hesitations about online scheduling.[9]

Providers' Interest in Online Scheduling[10]

2% Not very/ not at all interested

3% Unsure

17% Extremely interested

27% somewhat interested

52% Very interested

n = 200

Proactively Mitigate Concerns & Challenges: Approach common concerns and challenges head-on to help ease any lingering apprehension that providers or staff may have about the launch. For example, providers may be concerned about overbooked schedules, incorrect appointment types, or inappropriate patients coming into their practice. Help build confidence that they'll retain control of their schedules by sharing a well-thought-out and clearly communicated plan.
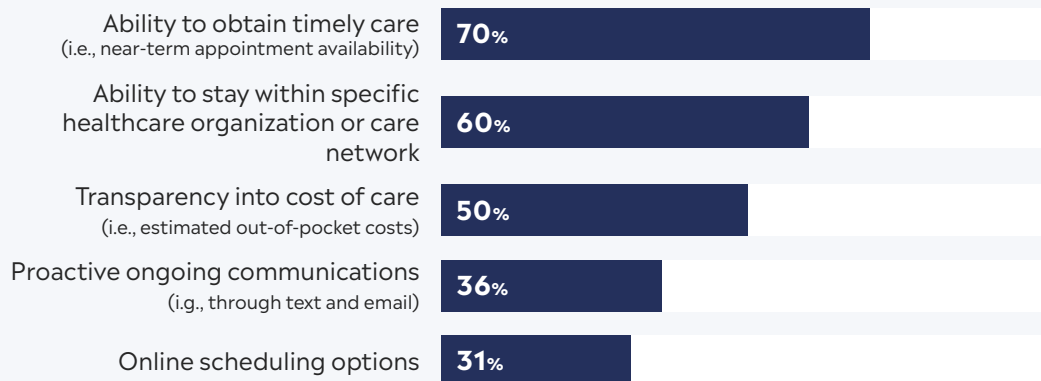
3 Create a Standardized, Repeatable Launch Plan

As you prepare to go-live with online scheduling, recognize that launching a project of this scale and complexity will require thoughtful planning to develop a repeatable execution strategy. Set your organization up for success by creating a launch plan that will be easy to follow in the future as you continue to bring more providers and services live.

Standardize Scheduling Templates and Protocols: Before bringing providers live with online scheduling, you'll want to prioritize creating standard scheduling templates and protocols. This will help to streamline the go-live process and ward off any confusion. Consider launching online scheduling by starting with a small subset of lower complexity appointment types, such as new patient appointments, across all specialties, providers, and services. This will enable you to bring on as many providers and specialty types as possible from the start, allowing you to more quickly gather data and understand the impact of your efforts—arming you with key information to improve the experience and provide insight as you expand the rollout.

Integrate Appointment Availability: Appointment availability is a top decision making-factor for consumers, with 70% saying it'll influence where they seek care in the future.[11] Surfacing this information in the provider search workflow will allow consumers to book directly into the practice management system. You can also reduce appointment wait times by displaying appointment availability across the network and enabling consumers to search easily for the earliest available appointment. It's possible, especially for larger organizations, that you may utilize multiple EHRs for scheduling—be sure to keep this in mind during the planning process and ensure your online scheduling solution can support this need.

Top Factors That Will Impact Where Consumers Will Seek Care in the Future[12]

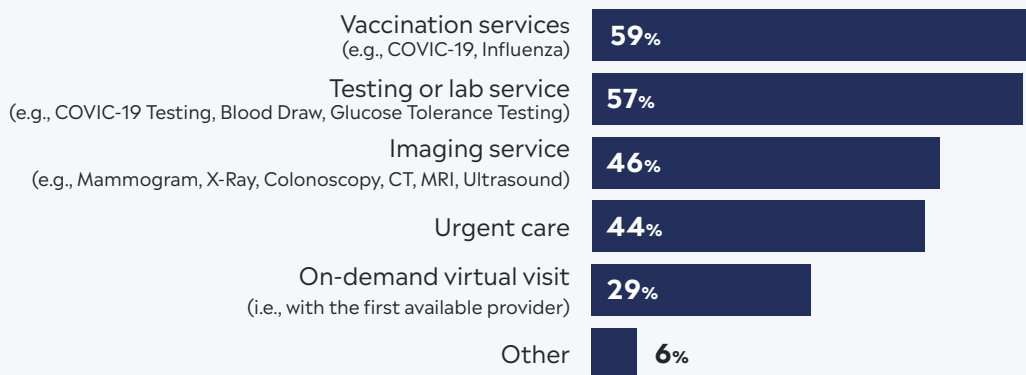| Factor	Percentage
Ability to obtain timely care (i.e., near-term appointment availability)	70%
Ability to stay within specific healthcare organization or care network	60%
Transparency into cost of care (i.e., estimated out-of-pocket costs)	50%
Proactive ongoing communications (i.g., through text and email)	36%
Online scheduling options	31%

n = 1000

Prioritize a Post-Launch Assessment: Understanding the success—and challenges—of your online scheduling launch is crucial for future expansion, so partner closely with department leads to hear early feedback on how things are progressing. Check in with your key provider and patient stakeholders as well to see how they are managing the shift to online scheduling. Are the new patients who book appointments online appropriate? What are patients saying about their online scheduling experience? Revisit the goals and KPIs that you set with your cross-functional stakeholders at this point. Are you on track? Work to understand any improvements or adjustments that could be applied as you move forward.

Broaden Booking Options Across Specialties, Appointment Types, and Services

4

Once you've gone through the initial launch, build on the valuable lessons you have learned and consider diversifying booking options across specialties and services. In doing so you can guide consumers to the appropriate level of care for their needs, maximizing provider capacity and utilization within your organization.

Expand Care Offerings Online: As noted, convenience is key for consumers, so make sure they can find and schedule care online with providers and services that represent all that your network has to offer. For example, enabling online scheduling for additional appointment types or service offerings allows you to create an easy, one-stop shop for a variety of patient needs. Remember, healthcare consumers are not always looking to find a specific doctor, but rather to find care, and services like annual mammograms, flu shots, labs, and urgent care appointments are important offerings to them—and because they are broader in nature, they are especially well-suited for online scheduling.

Top Expanded Care Offerings Consumers Search For[13]

Offering	Percentage
Vaccination services (e.g., COVIC-19, Influenza)	**59**%
Testing or lab service (e.g., COVIC-19 Testing, Blood Draw, Glucose Tolerance Testing)	**57**%
Imaging service (e.g., Mammogram, X-Ray, Colonoscopy, CT, MRI, Ultrasound)	**46**%
Urgent care	**44**%
On-demand virtual visit (i.e., with the first available provider)	**29**%
Other	**6**%

n = 879

Prioritize Business Rules: Opening up access further also allows organizations to consider the business rules that they have in place and optimize them. Some larger organizations may prefer to route flu shots and back-to-school appointments to a convenient care setting to distribute lower acuity demand outside of overbooked provider schedules. Another opportunity to maximize both provider utilization and patient access is to enable online scheduling for appointments with advanced practice providers (APPs) (e.g., physician assistants, nurse practitioners) if you have yet to do so.

Create Marketing Campaigns: This expansion period also offers many opportunities to create targeted messaging strategies that engage patients who are due for routine care. Consider developing marketing campaigns that leverage established health observances, such as breast cancer awareness month to promote preventive mammograms, or calendar-based events, like back-to-school season to boost annual physicals or immunizations. Including booking links in digital promotions make it convenient for consumers to schedule appointments directly with a provider. A well-designed marketing program can help improve patients' health by reducing gaps in care and helping them build long-term relationships with providers.

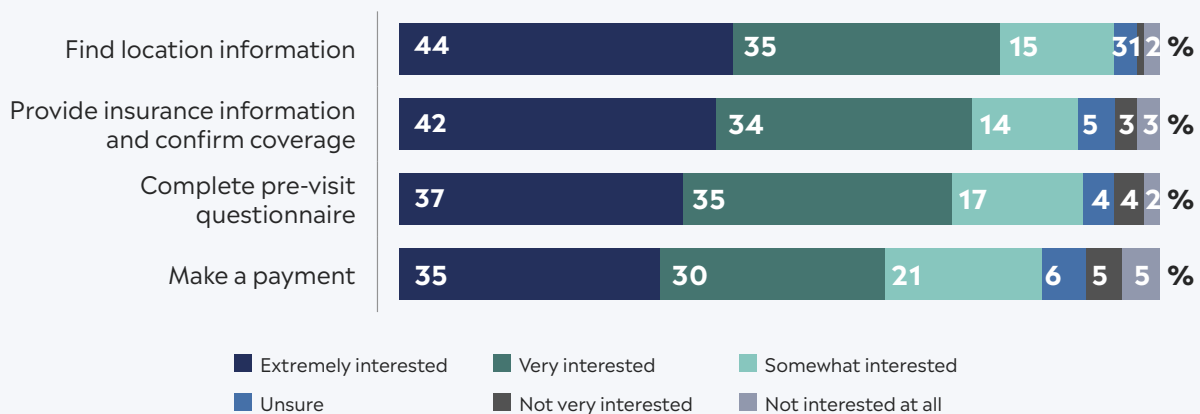# Optimize and Expand Upon Self-Service Capabilities

To better understand the consumer journey, leverage analytics to optimize your online scheduling offerings—and don't stop there. Consider additional expansion opportunities, such as offering online scheduling in various channels that consumers frequent most to further enhance their experience.

Analyze Ongoing Progress: Long-term success and expansion with online scheduling requires prioritization and cross-functional alignment with emphasis on communicating both your successes and lessons learned to better the experience for both patients and providers. Proactively review and share analytics on key metrics (e.g., number of appointments per provider booked online each week, search trends, and conversion rates from the website) to help you as you continue to optimize your strategy. It may be beneficial to send out weekly reports to pertinent groups or team members with the information that is relevant to them, enabling your organization to prioritize the types of providers or services that need to expand online availability to meet patient demand.

Expand to Additional Channels: As consumer preferences continue to evolve it will be important to ensure that your organization is meeting consumers where they are. Expanding your online booking experience to a mobile app, or other highly frequented consumer channels is key to extending your reach and capturing attention more broadly. As 80% of consumers are looking to two or more online resources when researching care options online, making it crucial that you offer access to accurate information and online scheduling capabilities in other channels such as search engines, health plan directories, and other third-party sites.[14] Doing so will ensure consumers have a unified experience regardless of where they search for care.

Broaden Digital-Self Service Capabilities: Consumer interest in digital self-service doesn't stop with online scheduling. A recent survey shows that people want to complete other healthcare related tasks—think pre-visit questionnaires (72%), making payments (65%), and confirming insurance coverage (76%)—online at their own convenience.[15] Aside from marked consumer interest, digitizing these experiences can also help to free up valuable staff time by allowing consumers to complete check-in processes on their own time—ensuring you have the right information to deliver quality care and receive proper reimbursement.

Consumer Interest in Completing Pre-Appointment Tasks Online[16]

Task	Extremely interested	Very interested	Somewhat interested	Unsure	Not very interested	Not interested at all
Find location information	44	35	15	3	1	2 %
Provide insurance information and confirm coverage	42	34	14	5	3	3 %
Complete pre-visit questionnaire	37	35	17	4	4	2 %
Make a payment	35	30	21	6	5	5 %

n = 1000

Best Practices for Implementing Online Scheduling

1 — Establish a single source of truth for provider, service, and location data

- Build an accurate view of provider, service, and location data to create a robust provider directory and single source of truth for your organization
- Enrich provider profiles with key data elements and layer on clinical and lay keywords to power an effective search, match, and book experience
- Establish business rules to ensure the digital patient experience reflects organizational priorities (e.g., surfacing employed before affiliated providers, steering patients to the appropriate provider or care setting based on acuity and availability, ect.)

2 — Engage cross-functional stakeholders across your organization

- Build support from a diverse group of stakeholders early in planning stages to help ensure the project stays on track
- Engage clinicians at the beginning of your project to include them in the creation of their digital presence and gain their buy-in for online scheduling
- Ease staff apprehension with a well-thought-out and clearly communicated plan—including ongoing updates to ensure key stakeholders are consistently up to speed

3 — Create a standardized, repeatable launch plan

- Standardize scheduling templates and protocols to ensure compatibility with online scheduling
- Display appointment availability on your provider profiles to give consumers a seamless and convenient search experience
- Check in with key stakeholders to hear feedback on the roll-out process and offer support in working through any challenges their areas may be facing

4 — Broaden booking options across specialties, appointment types, and services

- Leverage online scheduling for ancillary services such as annual mammograms, flu shots, labs, and urgent care centers to give consumers access to a variety of care options within a single experience
- Optimize your organization's business rules to improve provider utilization across your entire care network
- Implement creative marketing campaigns with strong call-to-action messaging—including online scheduling links—to engage patients in routine care that can help prevent more serious health issues in the future

5 — Optimize and expand upon self-service capabilities

- Share key online scheduling performance metrics with relevant departments to provide insight into patient demand and celebrate milestones
- Evaluate opportunities to extend your reach by adding online scheduling capabilities in additional channels where consumers are looking for care
- Embrace digital self-service for other healthcare related tasks (e.g., questionnaires, payments) to more deeply meet consumer preferences and free up valuable staff time

Online Scheduling Vendor Evaluation List

Use this checklist to assist you as you research options for an online scheduling vendor. You'll want to be sure that you are asking all the necessary questions to help make an educated decision.

1. **Does the solution have a provider, service, and location data management platform to assist with maintaining accurate data?** ☐

2. **Does the solution include a taxonomy of clinical terms to denote providers' clinical areas of focus beyond specialty/subspecialty for profile configuration?** ☐

3. **Does the solution demonstrate proven integrations with underlying scheduling systems and have the ability to support multi-system direct booking?** ☐

4. **Does the solution enable you to implement pre-booking questions to ensure patients are appropriate to book certain appointments online (e.g., annual screening mammograms)?** ☐

5. **Does the solution offer the ability to map consumer-facing visit types to the visit types in the practice management system?** ☐

6. **Does the solution support different types of provider specialties and service-based scheduling (mammograms, labs, etc)?** ☐

7. **Has the vendor proven that they can implement the solution in a reasonable amount of time resulting in reputable customers that are live and happy with their experience?** ☐

8. **Does the vendor have a dedicated customer support team with an issue escalation path in place?** ☐

9. **Does the solution offer robust analytics (including Google Analytics) to help organizations track the impact of the program that can be exported and shared out amongst teams?** ☐

10. **Does the solution offer additional digital self-service capabilities (e.g., pre-visit questionnaires, making payments)?** ☐

Endnotes

1   Kyruus Health, Patient Access Journey Report, 2022.

2   Kyruus Health, Patient Access Journey Report, 2022.

3   Kyruus Health, The State of Digital Patient Access, 2021.

4   Kyruus Health, Provider Perspectives on Digital Access, 2022.

5   Kyruus Health, Patient Access Journey Report, 2022.

6   Kyruus Health, analysis based on aggregate customer data from ProviderMatch Analytics, 2022.

7   Kyruus Health, Provider Perspectives on Digital Access, 2022.

8   Kyruus Health, Provider Perspectives on Digital Access, 2022.

9   Kyruus Health, Provider Perspectives on Digital Access, 2022.

10 Kyruus Health, Provider Perspectives on Digital Access, 2022.

11 Kyruus Health, Patient Access Journey Report, 2022.

12 Kyruus Health, Patient Access Journey Report, 2022.

13 Kyruus Health, data from a survey of 1,000 consumers, 2022.

14 Kyruus Health, Patient Access Journey Report, 2022.

15 Kyruus Health, Patient Access Journey Report, 2022.

16 Kyruus Health, Patient Access Journey Report, 2022.

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