

Patient Check-In Protocol

Front desk is the most important position in the office. You guys make the first impression. Make it an exceptional one! Please treat every person who walks in that door as your favorite friend. Really turn up the friendliness and enthusiasm. Setting the tone like this will make their whole experience worthy of telling their friends, which is the best way to build our practice. It will also help to get them into the buying mindset!

PSEye will be known as the warmest greeting around. Please focus on the greeting and make sure it is done like this.

You need to exude FRIENDLY and WELCOMING.

Good Morning X! Welcome to Park Slope Eye. How are you doing today?

We always welcome our guests with a warm friendly greeting. We know that people love being welcomed by name so we use it! If it is not Mr/Mrs they will let you know, its not a big deal.

We always come around the desk to introduce ourselves with a handshake.

My name is X, its a pleasure to meet you. I will be helping you check in today. Let me hang that up for you.

We always hang up there stuff, not just point to the coat rack.

We also know that it is very important to get a drink in their hand, because it is a key component into creating an impressive experience and helps put them in the buying mentality.

What are you drinking today? We have a ton of refreshments for you to choose from, today we have we have x,y, and z. What sounds good?

We know that it is important that we don't just say would you like something to drink because most people will say no. We also actually make the coffee, actually get the water, etc. and never just say its over there. Even if they are only getting water, put it in a PSE mug. Always mention beer if its after 5pm, this really impresses people!

After we have given them the drink, its the perfect time to ask for a favor.

For the time being we are will not be incentivize a check in. Simply Say:

"Did you check in yet ?"

1. No - "No? Well please do so as it helps spread the word about us to your friends. We would really appreciate it!"

2. Yes - "Great! Thank you. We really appreciate you spreading the word. Please take a lip balm as a thank you gift"

Before the doctor sees you, lets make sure we have all your info. Is the address on your drivers's license correct? I will scan a copy and enter it in. Also, please let me scan a copy of your medical insurance card.

Scan all ins cards and ID into their chart in the ID and Insurance card folder. Thank them and GIVE THEM BACK their cards! We have a stack of them and it makes us look bad when we fail to give it back.

Enter this info into demographics while the pt is in for the exam. Do not waste time doing it before. The goal is to get them into the exam or on the ipad as quick as possible.

Let's also make sure we have both of your insurance providers on file. Who is your vision coverage through?

Enter that info by copying and pasting from the provider website. Review the benefits with them. Go over the benefits, nobody likes to pay for something they didn't expect. If they say they don't have any, still always check VSP and Eyemed because a lot of people don't know they have it, and it will make their day. Also, its very difficult to straighten out after they have already paid.

Do you wear contacts? What brand do you wear? Do you happen to know your prescription?

(Start/Open the actual exam and put the Rx information history, then under the CL History)

After the front desk work is done, move the pt to pre-test where lenso and AR/AK will be done. Note: if they are wearing CLs leave them on....I will bring them out For AR/AK after I evaluate them.

People like to know what you are doing, why you are doing it and how it will benefit them. Always keep that in mind, it applies to most of the things you do for them. Simple things like this will build the practice because it gets people talking, look at how many yelp reviews make reference to me always explaining things.

Before the doctor sees you, we are going to take some measurements of your eye's and your glasses that will help him do your exam.

Bring them over to the lensometer. Say "This first machine is going to figure out the prescription in your glasses.

All I have to do is put the glasses right here and the machine will tell us what your Rx is. This often gives the doc a good starting point for your new prescription." (show the pt what you are doing, they are impressed by the fact that the machine can figure out their Rx!)

If the pt is not wearing contacts, ask then seat them at the AR: (alcohol swab chin and forehead rest while saying this) Next we are going to take some measurements of your eyes that will help the doctor come up with the best

prescription for you. Even though this looks like the puff test, its NOT the puff test. There is NO puff of air, in fact all you have to do is look a at picture, that's it. Ok, please put your chin here, and press your forehead all the way into here. Great, now please blink a few times, and then stare with your eyes wide open, all the way down the road to the building go in and out of focus. Don't worry if its in focus, its just a target for you to look at. Ok your doing great. Right eye was perfect, now we are going to do the same thing for the left eye. Ok, please blink a few times, and then stare with your eyes wide open, all the way down the road to the lighthouse. Perfect. You can sit back and relax. Great job.

Alright, I'm going to let the doctor know you're here and he'll be taking you in in a couple minutes - in the mean time, feel free to browse the snack bar and take anything you like. You can grab a seat over here or on the couch over there. Here is an ipad for you to use.

Then please IM the doc letting them know who they are, what they are here for, all insurance info, and if you put lenso/ar/cl info in yet. Also, make sure you ask if they used Yelp. You must get confirmation from the Dr. that this notification was seen. Typically, K. For ex. Chris, Yelper, CEE/CLE, United/VSP, Lenso/AR/CL info done

Please double check that we have all the demographic info, insurance cards and ID scanned and that we have made general notes. Also please make friends. Talk to them. You do not have to stop working, but try to get work done and talk to them.

Checking In is important because:

1. It gets people active FB and Yelp where we want them to be active so we can market to them and so they can market us to their friends.
2. It gives them a reward. This makes them feel good and establishes a subtle debt to us.
3. It blasts out that they were here. People will ask them about us.
4. It helps drive sales. Current check-in offer is 100 off a pair of glasses.
5. anyone have more to add?

Then ask if they use Yelp.

If they say yes:

"Great, we love yelpers! While your waiting for the doc, we would love it if you could check in on yelp. If you do, you can grab one of these awesome lip balms. There is also a surprise offer that can save you a hundred bucks!"

If they say no:

"Oh, ok, well yelp is a review site that helps me find out what is good in the neighborhood. I will send you our yelp page to your phone right now so you can get a feel for it." Then from our yelp page use "send to phone".