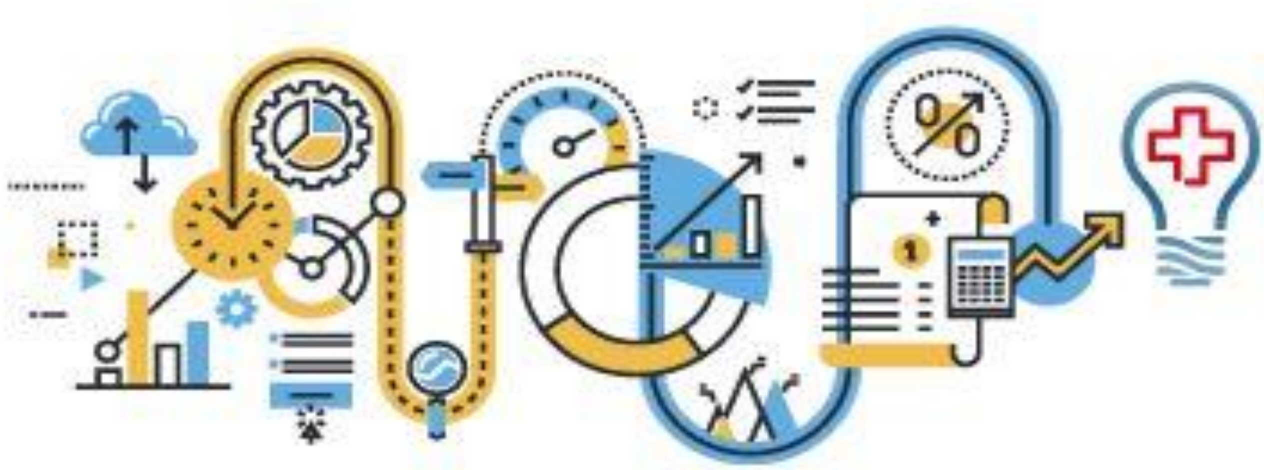
Clinect Healthcare

Customer Implementation Guide



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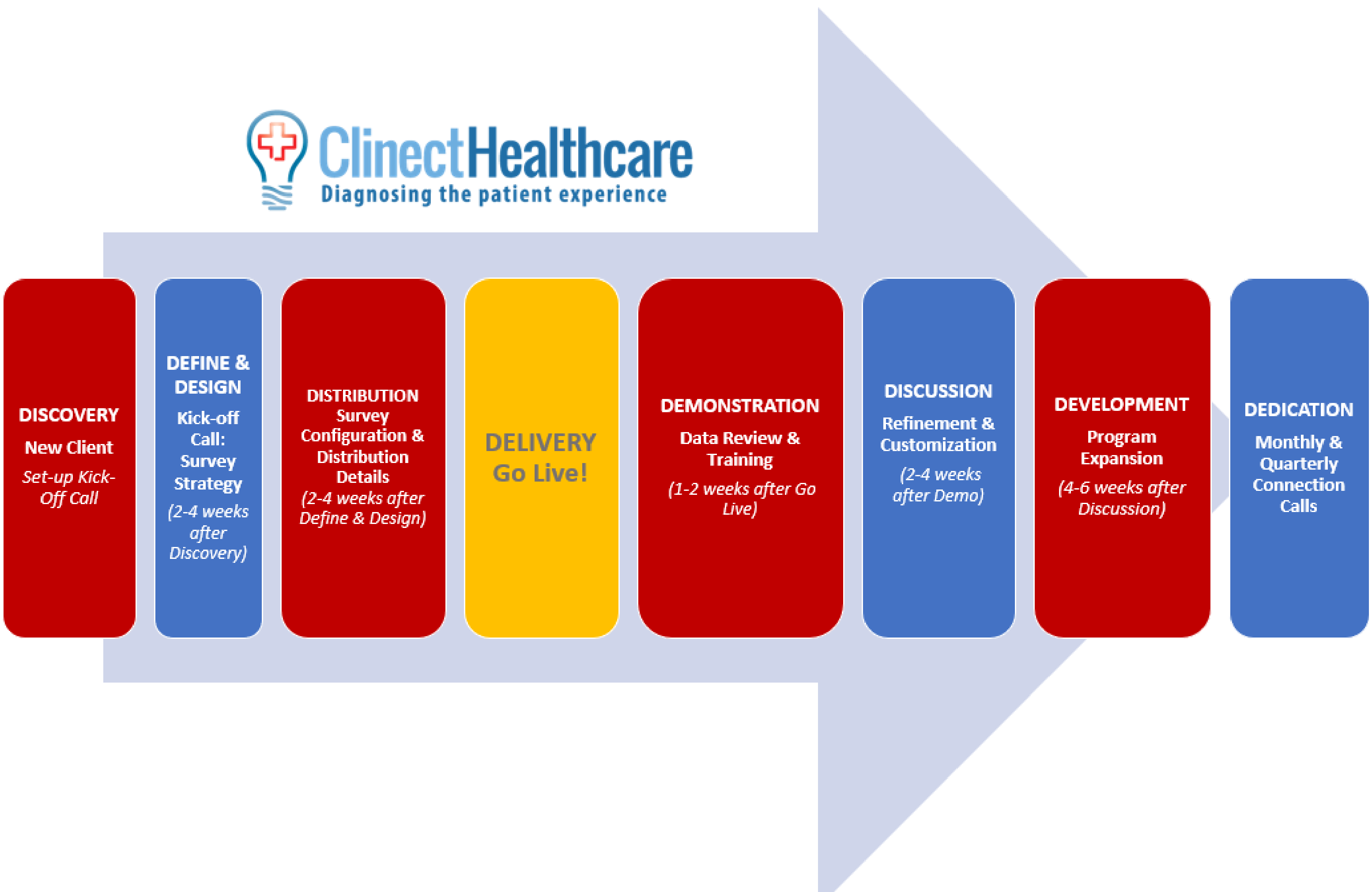
Welcome: We're So Pumped You're Here!

Clinect Healthcare is an innovative healthcare company dedicated to helping physician practices get a handle on one of the most challenging – but important – aspects of their business: truly understanding patient satisfaction and the patient experience. Clinect Healthcare is the innovator behind Clinect Patient Survey, the industry's first patient experience platform designed specifically for medical practices and the unique provider-patient relationship.

We are pleased to welcome you as part of the Clinect family. We feel honored that you have chosen Clinect to fulfill your patient experience needs, and we are eager to be of service. Our clients are our number ONE priority! We are delighted that you are part of the Clinect network and look forward to helping you to reach your goals. Please feel free to reach out to the Clinect team directly if you have any questions.

We are **ALWAYS** here to help!



Why is Patient Satisfaction Important?

The Institute of Medicine defines health care quality as the likelihood of achieving desired outcomes coinciding with contemporary knowledge. These outcomes are contingent upon receiving satisfactory healthcare services inclusive of all persons. So how is quality healthcare measured and why is patient satisfaction important?

One of the most common indicators of measuring healthcare quality is patient satisfaction. Patient satisfaction affects a variety of growth opportunities stemmed from staff reaching better health conclusions, delivering better quality of care, and realistically managing the expectations of patients. Research has demonstrated that timeliness, efficiency, and attention to the patients' perspective are all influential attributes dictating outcomes of patient satisfaction. Patient experience predicts patient satisfaction. With that being said, healthcare administrators, providers, and teams should emphasize efforts and shift all attention to creating cultures that live and breathe service excellence. A culture that revolves around service excellence is reflective of the commitment in delivering a high-quality patient experience to all patients at every single encounter. Service excellence is described as the providers' and teams' ability to maintain and manage expectations both clinically and personally consistently. Instilling pride into a service excellence culture is almost a guarantee of employees' willingness to replicate an 'attitude' of service excellence. This culture in turn may result in a positive association of the quality received and a higher patient satisfaction score.

Monitoring patient satisfaction is important as it ultimately affects the success of doctor's, and hospitals through clinical outcomes, patient retention, and legal claims associated with these entities. Awareness of how patients perceive services and quality of care can help staff gain insight to formulate an action plan and create/maintain a culture that constantly delivers to the standards the company strives to be acknowledged for. Remember office culture breeds patient experience!

Here are 5 easy strategies to start creating your culture of service excellence:

1. Always demonstrate respect.
2. Communication. Clear, concise, and in terms that are easy to understand.
3. Active listening.
4. AIDET model (continued next page).
5. Always thank the patient.

AIDET Model: Studer, 2005

Studer Group's Five Fundamentals of Communication is **AIDET®**, an acronym that stands for Acknowledge, Introduce, Duration, Explanation and Thank You.

The keys to effective patient and customer communication include:

A	Acknowledge:	Greet the patient by name. Make eye contact, smile, and acknowledge family or friends in the room.
I	Introduce:	Introduce yourself with your name, skill set, professional certification, and experience.
D	Duration:	Give an accurate time expectation for tests, physician arrival, and identify next steps. When this is not possible, give a time in which you will update the patient on progress.
E	Explanation:	Explain step-by-step what to expect next, answer questions, and let the patient know how to contact you, such as a nurse call button.
T	Thank You:	Thank the patient and/or family. You might express gratitude to them for choosing your hospital or for their communication and cooperation. Thank family members for being there to support the patient.

What is Net Promoter Score (NPS)?

Net Promoter Score (NPS) created by Fred Reichheld and Bain & Company, determines the overall customer sentiment with the following question:

"On a scale of 0 to 10, with 10 being highest, what is the likelihood that you would recommend us (our company) to a friend or colleague?"

The score, on a scale of one to 10, falls into three groups: Promoters, Passives, and Detractors. If a customer scores you as a nine or a 10, they are *promoters*. If they score you as a seven or an eight, they are *passive*. You don't know if they are leaning toward loving you, leaving you, or they just don't care. And, a score of a six or lower means you have a *detractor*. To determine your official NPS score, take the percentage of promoters (nines and 10s) and subtract the percentage of detractors (sixes and lower). That number is your Net Promoter Score.

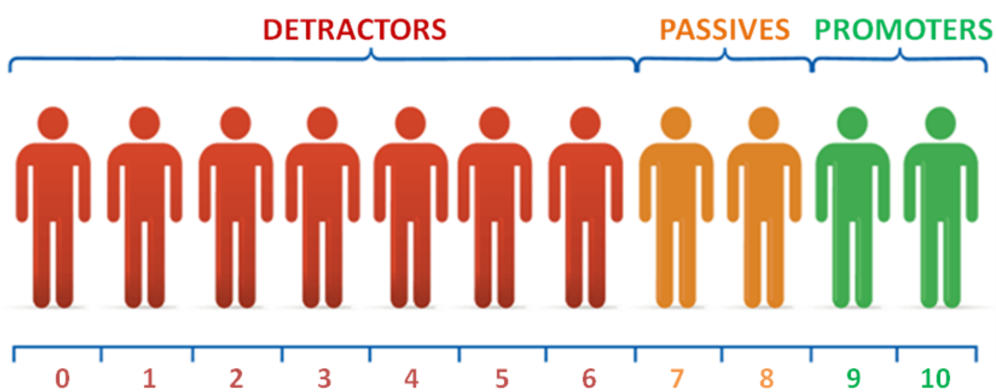
So, what constitutes a good NPS score?

Any score above 0: *Good*

50 and above: *Excellent*

70 and above: *World Class*

*Currently the healthcare industry NPS benchmark is **76**. *



Please note the healthcare industry average does fluctuate. The data listed here is the healthcare industry benchmark score as of January 2019

DEFINE & DESIGN: Kick-off Call-Survey Strategy

Estimated Time to Complete: 2-4 Weeks after Discovery

The implementation process begins with Define & design. We typically start by scheduling a kick-off call after all necessary forms have been submitted. The kick-off call serves as an information gathering session. The Clinect Account Manager will reach out to the project point person on the customer side to set up the call.

During the call we will identify key team members, confirm practice specific details and determine the project goals and objectives. The gathered information helps to establish the survey strategy and guides the survey design process. A detailed outline of the kick-off call agenda can be found below.

After the kick-off call, the Clinect Account Manager will use the information collected to compile survey drafts to be reviewed and edited by the customer. The questions included in the drafts will be based on the customer objectives and target initiatives. Sample survey questions can be found in the Customer Resources section of this Implementation Guide.

DEFINE & DESIGN: Next Steps

1. Send company logo, preferably as an EPS or PNG file. (If those files are not available, JPEG can be used.) (Customer)
2. Create survey draft(s) based on objectives discussed during kick-off call. (Clinect Account Manager)
3. Send Survey Guide Reference Document and survey drafts to customer. (Clinect Account Manager)
4. Request that a configuration workbook be created for the customer. (Clinect IT Team)
5. Review survey drafts and send edit requests. (Customer)
6. Implement all changes requested by customer and send revised survey drafts. (Clinect Account Manager)
7. Review revised survey drafts and send additional edit requests or communicate approval of drafts. (Customer)
8. Upon receiving approval of drafts, create digital mock-up of survey(s) and send to the customer. (Clinect Account Manager)
9. Request to have create digital mock-up of survey(s). (Clinect IT Team)
10. Review and approve digital mock-up of survey(s). (Customer)
11. Create office signage for client to display. (Clinect Account Manager)
12. Start executive summary sheet for Client. (Clinect Account Manager)
13. Schedule DISTRIBUTION call. (Clinect Account Manager & Customer)

DISTRIBUTION: Survey Configuration & Distribution Details

Estimated Time to Complete: 2-4 Weeks after Define & Design

Once the initial survey drafts have been approved, we move on to Distribution. The Clinect Account Manager and Customer Project Point Person will connect on a WebEx to establish the locations and providers that should be active with the program and decide which appointment types should trigger surveys. The Clinect Account Manager will provide the customer with a configuration workbook that will include the locations, providers and appointment types available in the PM/EHR system.

We will also finalize the survey distribution details including the 'event' that will serve as the survey trigger, the survey delivery method (text message and/or email), the timing of when the survey will be sent (real-time or delayed) and if there should be any restrictions placed on the number of surveys sent to a patient during a specific time period.

We will also review examples of verbiage to be used in the text message and/or email survey invitations that will be sent to the patients. Examples of these messages can be found in the Customer Resources section of this Implementation Guide.

We recommend waiting until the surveys go live and there is response data available before conducting the portal training. Viewing the portal sections and reports is more meaningful when there is real data to view. The data review and portal training session are typically scheduled 1-2 weeks after the surveys go live.

DISTRIBUTION Call Outline

1. Confirm Survey Mock-up(s)

2. Finalize Survey Configurations

- **a. Active Locations**
- **b. Active Providers**
- **c. Associated Appointment Types**

3. Establish Survey Distribution

- **a. Trigger 'Event'/Appointment Type**
- **b. Delivery Method**
- **c. Delivery Timing**
- **d. Survey Frequency**

4. Discuss Verbiage for Survey Invitations

DISTRIBUTION: Next Steps

1. Confirm final approval of the survey mock-ups. (Customer)

2. Send Configuration Workbook that was reviewed during the WebEx to customer. (Clinect Account Manager)

3. Review, edit and submit final version of the Configuration Workbook to Clinect Account Manager. (Customer)

4. Create and send survey invitation drafts based on established distribution method(s) and discussion during call. (Clinect Account Manager)

5. Review, edit and submit final version of invitation(s). (Customer)

6. Send confirmation of distribution details as established during WebEx. (Customer)

7. Complete all necessary configurations associated with the survey program. (Clinect IT Team)

DELIVERY: Go Live!

1. Go-Live: surveys will start going out to patients. (Clinect IT Team)

DELIVERY: Next Steps

1. QA Checklist (Clinect Account Manager)

2. Clinect will monitor the survey portal URL to confirm surveys are being sent and responses are coming in. (Clinect Account Manager)

3. Schedule Demonstration Call/WebEx: Clinect Portal Review (Clinect Account Manager & Customer)

DEMONSTRATION: Data Review & Training

Estimated Time Frame: 1-2 weeks after Delivery: Go Live!

After the surveys have been live for 1-2 weeks, there should be a fair amount of response data available to view in the portal. This is the ideal time to conduct the portal training session. It is typically best to have a select group of portal users included in this initial training session. Additional sessions can be scheduled for additional users later (typically during the Discussion and Development phases of implementation).

During the training session, the Clinect Account Manager will review the initial responses that have been submitted as well as the functionality of the various sections of the portal. Following the training session, the customer will be provided with a User Guide and access to additional training resources including the link to Clinect University.

DEMONSTRATION Call/WebEx: Portal Review Outline

1. Portal Filters

2. Dashboard Graphs

3. Creation of Manual Incidents

4. Applying Tags

5. Editing Incident Statuses

6. Running Standard Reports

7. Viewing Responses

8. Survey Summary

9. Drilling Down Survey Answers

10. Review Patient Experience Best Practices

DEMONSTRATION: Next Steps

1. Grant portal access for initial users. (Clinect Account Manager)

2. Send User Guide/Training Resources. (Clinect Account Manager)

3. Educate staff on Clinect platform and display office signage. (Customer)

4. Review process for collecting patient cell phone numbers and/or email addresses provided by Clinect Account Manager. (Customers)

5. Schedule Discussion Call (Clinect Account Manager & Customer)

DISCUSSION: Refinement & Customization

Estimated Time Frame: 2-4 weeks after Demo

Once the initial users have had an opportunity to become more familiar with the portal and the initial responses, we move onto the refinement and customization phase. The Clinect Account Manager and Customer Project Point Person will connect via WebEx to review the survey response rates, discuss patient experience best practices (as needed), establish triggered incidents, customize the data displayed in the Dashboard Graphs, add custom incident tags & statuses and create custom reports (as needed).

This is also a good time to add additional users, especially location and department managers. Once the customizations have been finalized, we recommend scheduling another training session for all portal users.

DISCUSSION Call Outline

1. Review Best Practices as Needed

2. Review Response Rates (Discuss strategies for improvement, if necessary)

3. Customize Data Displayed on Dashboard Graphs (Recommendations to be provided by Clinect)

4. Establish Triggered Incidents (Recommendations to be provided by Clinect)

5. Adding Custom Incident Tags

6. Adding Custom Incident Statuses

7. Creation of Custom Reports

8. Adding Additional Users

DISCUSSION: Next Steps

1. Send confirmation of customization details discussed during call (Dashboard Graphs, Triggered Incidents, Incident Tags & Statuses, Reports). (Clinect Account Manager)

2. Send Dashboard Graph workbook & recommended triggered incidents for client to review. (Clinect Account Manager)

3. Provide any additional information or confirmation needed to complete customizations discussed during call. (Customer)

4. Provider information on additional users to be added (Name, Email Address, Access Restrictions). (Customer)

5. Grant portal access for additional users. (Clinect Account Manager)

6. Complete all necessary configurations associated with the customizations. (Clinect IT Team)

7. Schedule training session for all/new users. (Clinect Account Manager and/or Customer)

8. Schedule Development Call (Clinect Account Manager & Customer)

DEVELOPMENT: Program Expansion

Estimated Time Frame: 4-6 weeks after Discussion

After being live with Clinect for a couple months, it is a good time to revisit the program and discuss opportunities for expansion. This may include adding additional surveys for specific services, incorporating automated touchback communications to increase your presence online, and discussing other marketing opportunities. The development phase is also a good time to audit the current configurations in place to determine if any changes are needed.

DEVELOPMENT: Next Steps

1. Send confirmation of configuration changes discussed during auditing process (Updates to Providers, Locations, Appointment Types, Users, Triggered Incidents, Surveys). (Clinect Account Manager)

2. Provide any additional information or confirmation needed to complete configuration updates discussed during call. (Customer)

3. Send confirmation and/or examples for areas of expansion as discussed during call. (Additional Survey(s) Drafts, Online Reputation Monitoring Guide, Marketing Communications) (Clinect Account Manager)

4. Provide any additional information or confirmation needed to complete expansion areas discussed during call. (Customer)

5. Complete executive summary sheet for Client. (Clinect Account Manager)

6. Schedule Dedication Call (Clinect Account Manager & Customer

DEDICATION: Monthly & or Quarterly Connection Calls

Ongoing

Dedication can be viewed as an ongoing maintenance phase. It is an opportunity for the customer to connect with their Clinect Account Manager on a consistent basis to stay updated on the latest Clinect enhancements and patient experience best practices. It also helps ensure that we regularly audit the customer’s portal configurations and provide training on portal features as needed. These connection calls can be scheduled monthly or quarterly based on the customer’s preference.

DEDICATION: NEXT STEPS

Schedule Ongoing Monthly/Quarterly Connection Calls (Clinect Account Manager & Customer)

Best Practices

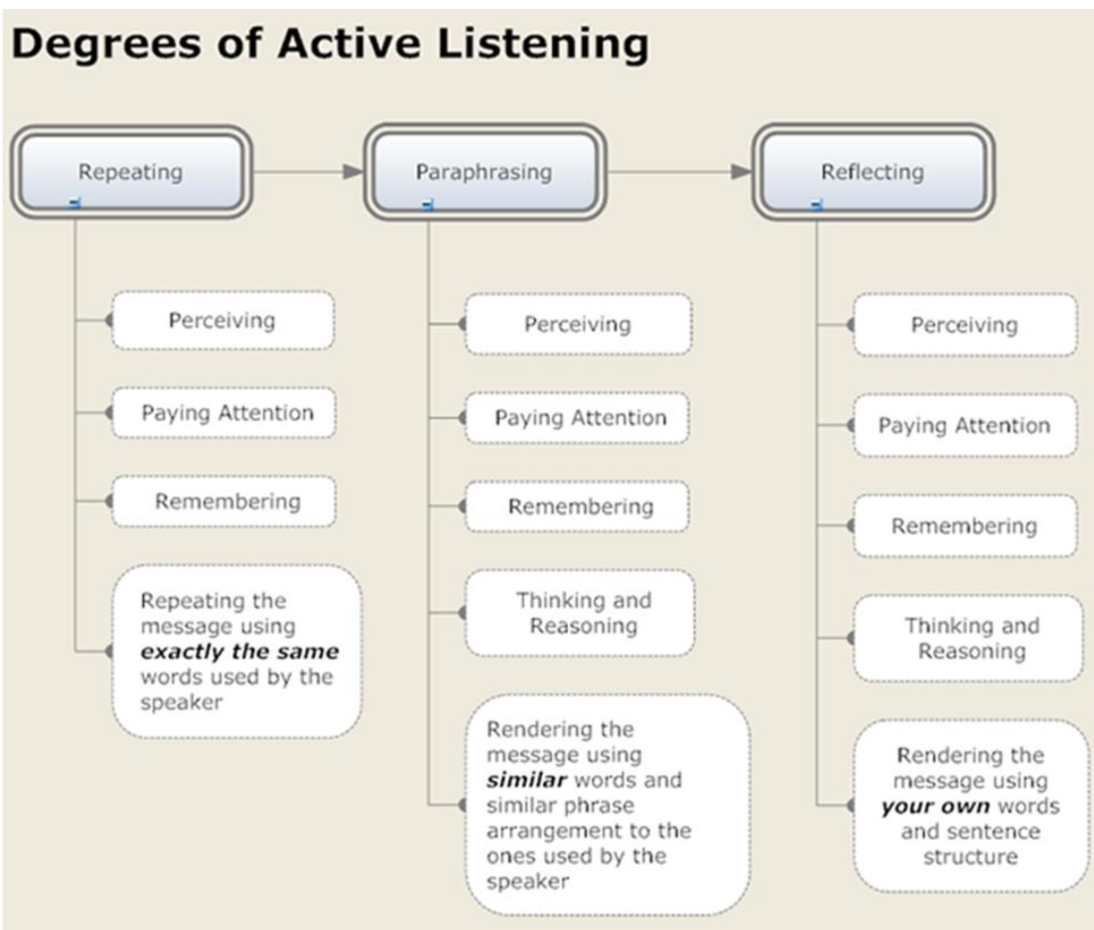
The Best Practices section provides recommended courses of action for your staff that will contribute to creating a culture of service excellence. The suggested Best Practices included are to help aid positive patient experiences through behavioral and communicative efforts. For example, by providing an incident management protocol, you can ensure that all employees will be expected to document all incidents with clear and concise details consistently. The Best Practices section has a vast range of suggestive solutions for your staff to adopt.

Best Practices: Active Listening

Active listening can be a simple solution to increasing patient satisfaction. Patients often associate patient satisfaction or receiving service excellence by expressing that they felt "heard" and "listened to" by the staff and provider. Here are some key elements to active listening.

1. Pay attention
2. Show that you are listening
3. Provide feedback
4. Defer judgment
5. Respond appropriately

There are several degrees of active listening. Here are some ways to increase the retention of information:



Best Practices: AIDET Model: Studer, 2005

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Best Practices: Provider Best Practices

Doctors, patients, and the organization are the 3 primary factors that service excellence revolves around. A provider can lead the service excellence charge by contributing with an increase in patient communications. Below are a few "house rules" that all healthcare employees could adopt to improve provider communication and potentially increase patient satisfaction scores. (https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3047732/)

House Rules	Action
Break the ice	Make eye contact, smile, call people by name, express with words of concern.
Show courtesy	Kind gestures and polite words make a patient very comfortable.
Listen and understand	Encourage patients to tell their problem. Invite and answer their questions.
Inform and explain	It promotes compliance. People are less anxious when they know what's happening.
See the whole person	See beyond illness the whole person.
Share the responsibility	Risks and uncertainty are facts of life in medical practice. Acknowledging risks builds trust.
Pay undivided attention	This reduces distractions and interruptions as much as possible.
Secure confidentiality and privacy	Watch what you say, where you say, and to whom you say.
Preserve dignity	Treat the patient with respect. Respect modesty.
Remember the patient's family	Families feel protective, anxious, frightened, and insecure. Extend yourself, reassure, and inform.
Respond quickly	Keep appointments, return calls, and apologize for delays.

Best Practices: Understanding the Patient

Patients have high healthcare expectations and their perception of care is what feeds ratings, feelings, and views of patient satisfaction. Patient satisfaction weighs heavily on several contributing factors. Perhaps understanding expectations from *a patient's perspective* will translate into quality healthcare.

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Understanding the Patient

1. Recognize that patients expect a personal relationship that shows compassion and care.
2. Recognize that the patient has got certain rights. Various regulatory authorities and hospitals have drawn a charter of rights for the patients.
3. Make sure a patient has got a good first impression of you and your set up.
4. Step into your patients' shoes; see through their eyes and hear through their ears.
5. Minimize the patient's waiting time to the least possible.
6. Try to make your problem-solving system to be functional.
7. Always obtain feedback from your patients and correct shortcomings if any.

Best Practices: Incident Management Protocol

Incidents are the result of extremely happy or disgruntled patients who respond a certain way via the patient satisfaction survey. This triggers an alert or call to action. Alert preferences for your specific company have been set-up by your administrator.

Triggered Incidents: Incidents created automatically when specific responses to select survey questions are submitted.

Manual Incidents: Incidents created manually by a user via the incident form. When an incident is created, there is the option to include select portal users as 'Followers'.

The practice can assign automatic Followers for triggered incidents based on location, provider, and/or survey question/response. Followers receive an automated email notification to make them aware of the creation of the incident. The email contains a link to the specific incident, where they can view details and take any necessary action.

Incident Title: The title of the incident is shown at the top. If it is a triggered incident, the title will contain the name of the survey and the first question that set the trigger. Titles for manual incidents will appear as what was typed into the Title field when the incident was created.

Activity Thread: The activity thread shows a timeline of all notable activity that has taken place on the incident. *Each activity is automatically time/date stamped and includes the name of the user who associated with the activity.*

Comments: Comments can be documented by typing into the white text box and clicking on the blue 'Comment' button to save. There is no limit to how many comments can be added. A new text box will appear each time a comment is saved. (Please Note: Once a comment has been saved it cannot be edited.) The comments added to the incident management screen may only be accessed via the Clinect portal or from reports generated within the portal. The information is not shared with the patient nor does it populate in the patient's PM or HER account.

Clinect's incident management tool is intended for staff documentation. Clinect recommends detailed documentation inclusive of follow-up communications and/or interactions, so that anyone can view the incident and be clear on the details and status of process. Proper documentation should include details of all parties involved, the 'incident,' and details on how the incident will be rectified.

Be sure to update the status of the incident(s) throughout the process. If more than one department should be involved, keep the status 'In Progress' until all affiliated departments have for appropriate resolutions.

Patient Reported Outcomes | Patient Satisfaction | Incident and Alert Mangement

Best Practices: Incident Management Protocol: At a Glance

Be specific, clear, and concise.

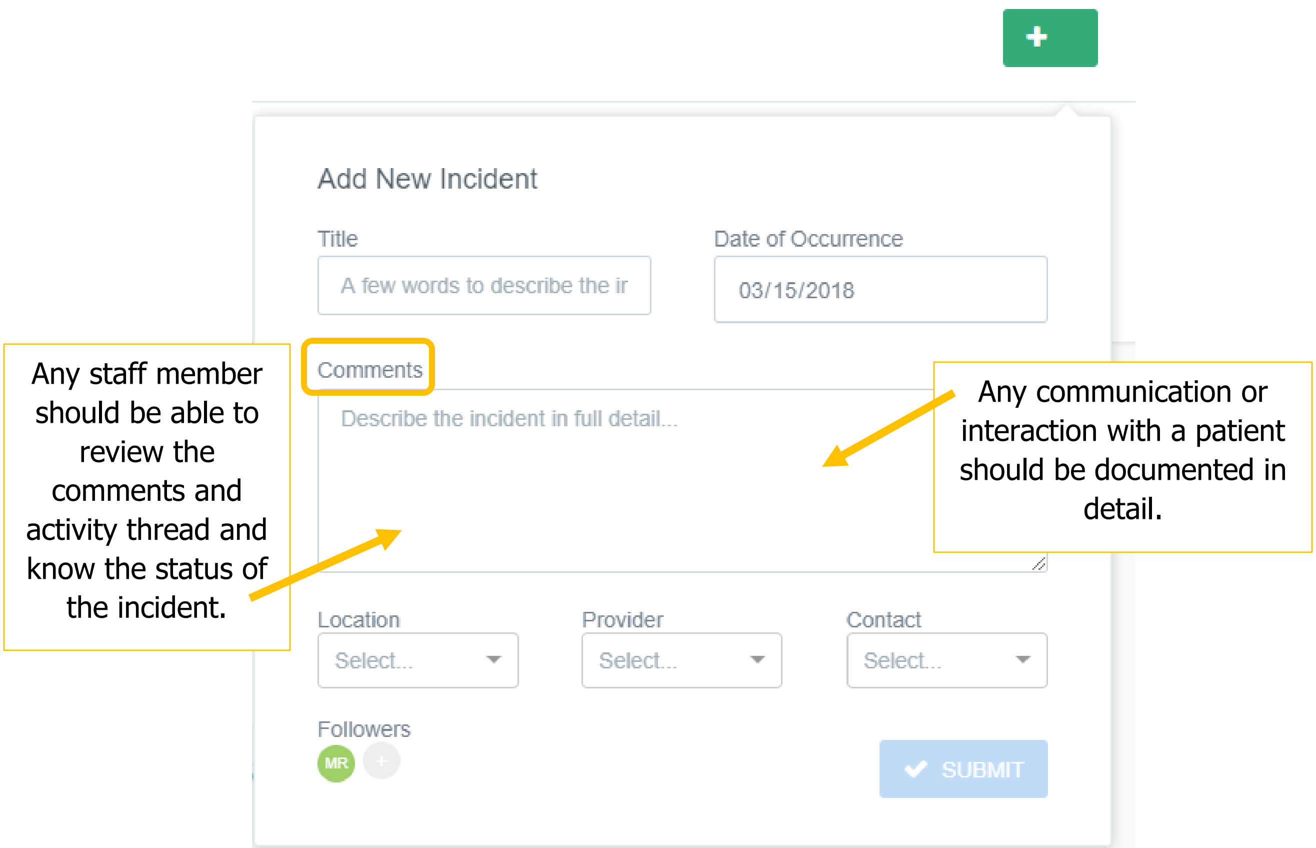
There's no such thing as TOO MANY details!

All communication(s) and/or interaction(s) with the patient in relation to the incident **MUST** be documented.

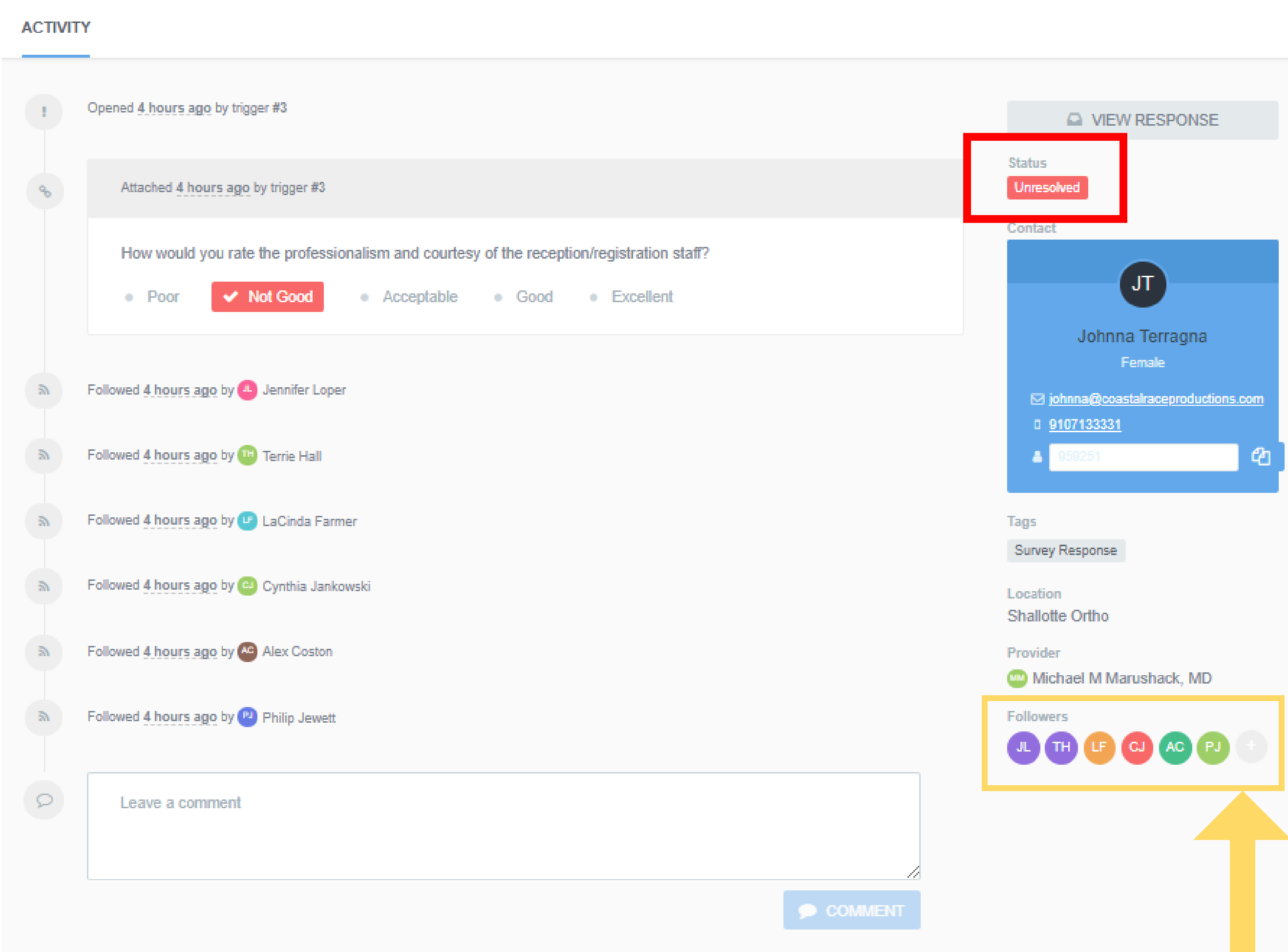
Any staff member should be able to review the comments and activity thread and know the status of the incident.

PLEASE note the activity thread *automatically* stamps the date/time.

Manually Creating an Incident



Automatically Triggered Incidents



Trigger #3: Rating of the professionalism and courtesy of the reception/registration staff

All staff members who are listed as 'Followers' receive the same notification.

The primary "incident manager" of trigger #3, should investigate the incident internally FIRST.

The staff members' viewpoint on the incident should be documented in detail prior to reaching out to the patient/parties involved.

The status should be updated from 'Unresolved' to 'In Progress' while seeking resolution.

Be sure to document both sides of the story and the resolution that you or management will demonstrate to resolve the issue(s).

Once the incident manager feels the patient is at ease and happy, any additional documentation should be included, and the Incident status should be closed with 'Resolved.'

This should occur for **ALL** triggered and manually created incidents.

Best Practices: Email Address Capture

Customer Resources

The Customer Resources section provides a plethora of example content to be utilized at your disposal. The Customer Resources section includes the following:

- The Survey Question Reference Document
- Templates for Survey Communications
- Office Signage Examples
- Additional Resources
    - User Access
    - Triggered Incidents
    - Thank You Messages
    - Automated Touchback Emails
    - Marketing Communications

Customer Resources: Survey Question Reference Document

The Survey Question Reference Document below is to assist you during the Define & Design phase. It provides an explanation of each type of categorical survey, examples of survey questions, and examples of specialty-specific questions. This section is to be used as a reference guide to compile your survey(s).

Clinect Healthcare recommends your survey contain 10-15 questions, as this allows for adequate information to be gathered while keeping the length manageable for the patient. In addition to static questions, we can enable dynamic questions that populate based on specific responses. These 'follow-on' questions can provide the opportunity to capture additional information while maintaining a reasonable survey length.

Patient experience questions can be placed into categories based on the type of information being asked. Questions from multiple categories can be used to create a single survey. Descriptions of the most common categories can be found below. We've also included question examples for each.

Net Promoter Score (NPS)

The NPS question is used to measure a practice's success with patient experience, satisfaction and loyalty. Based on the response, patients are divided into three categories: Detractors (0-6), Passives (7-8), and Promoters (9-10). NPS is calculated by subtracting the percentage of Detractor from the percentage of Promoters.

General Practice

This group of questions will provide feedback on the patient's overall visit experience, focusing on non-clinical aspects. The questions include but are not limited to cleanliness, wait times, appointment availability, and other items.

Clinical

Clinical questions are specifically related to the patient's direct interaction with clinical staff. These vary from rating the provider to receiving a care plan.

Revenue Generating

Clinect Healthcare can incorporate questions that will allow introduction to new or additional services the office renders. The services will benefit the patient and generate additional revenue.

Compliance

Patient Centered Medical Home (PCMH) is now requiring the measuring and reporting of the patient experience. Clinect Healthcare offer solutions for meeting the survey requirements for PCMH certification.

Specialty Specific

The questions in the section are directly related to specific issues regarding the type of specialist office, for example Physical Therapy, Pain Management, OBGYN.

Customer Resources: Net Promoter Score (NPS) Question

How likely are you to recommend our practice to family members and friends?

Very Unlikely Very Likely

0 1 2 3 4 5 6 7 8 9 10

If Response is 0-6, ask follow-on: What disappointed you about our service?

Customer Resources: General Practice Questions

Please rate the ease of scheduling this appointment.

Very Poor Excellent

1 2 3 4 5

Please rate the courtesy and respect you received from our phone and scheduling staff.

Very Poor Excellent

1 2 3 4 5

Did our appointment time/availability meet your needs?

Yes No

If No, ask follow-on: 'Please explain:'

Please rate your ability to communicate with the practice on the phone.

Very Poor Excellent

1 2 3 4 5

Were you able to locate our office easily?

Yes No

Please rate how well we maintained patient privacy throughout your visit.
Very Poor Excellent
1 2 3 4 5

How long was your wait time in the Lobby?
Less than 15 minutes
16-30 minutes
31-45 minutes
46-60 minutes
More than an hour

How long was your wait time to see the physician in the exam room?
Less than 15 minutes
16-30 minutes
31-45 minutes
46-60 minutes
More than an hour

Please rate how well you were informed about any delays during this visit.
Very Poor Excellent
1 2 3 4 5

Please rate the comfort and appearance of the waiting area.
Very Poor Excellent
1 2 3 4 5

Is there a staff member you would like to recognize for his or her excellent care?
Yes No
If Yes, ask follow-on: 'Please share who you would like to recognize:'

Was our check in process and registration process easy to complete?
Yes No
If No, ask follow-on: 'Please explain:'

How would you rate our overall billing and account services?
Very Poor Excellent
1 2 3 4 5

If you called our billing office with a question, how long did you wait before you received a call back?
Same day
Next Business Day
2-3 Business Days
Other:

Why did you choose our practice?
Referred by Emergency Dept./Urgent Care
Referred by a friend or family member
Website/Internet Search
Promotional Advertisement
Referred by another Physician

Would you like to share any general comments about your visit or your experience with us?

Please tell us how this clinician's office could have improved the care and services you received.

Customer Resources: Clinical Related Questions

How would you rate this provider overall?

Worst										Best
1	2	3	4	5	6	7	8	9	10	

If Response is 0-6, ask follow-on: What disappointed you about this provider?

Did you receive instructions on how to care for your condition?
Yes No

Please rate your physician in terms of competency and knowledge.
Very Poor Excellent
1 2 3 4 5

Please rate your confidence and trust in your surgeon/provider who treated you.
Very Poor Excellent
1 2 3 4 5

Please rate the professionalism and courtesy of your nurse/technician during your visit.
Very Poor Excellent
1 2 3 4 5

Please rate the professionalism and courtesy of the physician during your visit.
Very Poor Excellent
1 2 3 4 5

How would you rate your physician's personal manner (courtesy, respect, sensitivity, friendliness)?
Very Poor Excellent
1 2 3 4 5

Please rate the amount of time you spent with your physician.

Very Poor Excellent
1 2 3 4 5

Please rate how well the doctors, nurses and other staff worked together as a team regarding your care.

Very Poor Excellent
1 2 3 4 5

Please rate how your surgeon/provider did in explaining your treatment and follow up plan.

Very Poor Excellent
1 2 3 4 5

Please rate how well your clinician listened to you and answered your questions in a way that was easy to understand.

Very Poor Excellent
1 2 3 4 5

When you phoned this clinician's office during regular office hours, did you get an answer to your question that same day?

Yes No

Did anyone in this clinician's office talk with you about specific goals for your health?

Yes No

Customer Resources: Revenue Generating Questions

Would you like to receive additional information regarding (insert ancillary/elective service(s))?

Yes No

Do you currently have a primary care Physician?

Yes No
If No, ask follow-on: 'Would you like to learn more about our primary care services?'

Did you know we offer classes in (insert, i.e. Breastfeeding, Diabetes)?

Yes No
If No, ask follow-on: 'Would you like us to contact you about our classes?'

Was our office location conveniently located to your work or home?

Yes No
If No, ask follow-on: 'Which zip code would be more convenient?' *(May be used for scouting new locations.)*

Do you feel further physical therapy treatment is needed?

Yes No

Customer Resources: Compliance Questions

Have you registered for our patient portal?
Yes No

If No, display: The patient portal allows you to message your doctor, request appointments, review your charges and request medication refills.
Would you like someone from our office help you with access to the portal?
Yes No

Since you have been a patient with us, have you been seen by a specialist?
Yes No
If Yes, ask follow-on: 'Were we able to effectively coordinate care with your specialist practice?'

If you received laboratory testing, were you contacted with the results?
Yes No

If you received any imaging services, were you contacted with the results?
Yes No

Customer Resources: Specialist Questions

Specialist Questions: Physical Therapy

Rate your improvement at your discharge from physical therapy?
Very Poor Excellent
1 2 3 4 5

Would you like for a therapist to call you to discuss any follow up questions you might have?
Yes No

Do you feel further physical therapy treatment is needed?
Yes No

Please rate how your therapist did listening to your concerns and explaining your physical therapy treatment plan.
Very Poor Excellent
1 2 3 4 5

Did your therapist explain why follow up treatments are important for best results?
Yes No

How would you rate the overall communication of your physical therapy goals?
Very Poor Excellent
1 2 3 4 5

Rate your Physical Therapist's overall attentiveness and helpfulness.
Very Poor Excellent
1 2 3 4 5

Are you seeing improvement with your physical therapy?
Yes No

Specialist Questions: Behavioral Health

How would you rate the consistency of the information you received (materials, what staff/practitioners told you, etc.)?
Very Poor Excellent
1 2 3 4 5

How well did your practitioner focus on achieving the goals for your counseling or treatment?
Very Poor Excellent
1 2 3 4 5

Do you feel you were matched with a practitioner who was right for your needs and preferences?
Yes No
If No, display: 'Please Explain:'

How well did your practitioner provide you with information about what you could do to help manage your condition?
Very Poor Excellent
1 2 3 4 5

How well did your practitioner and other health practitioners, worked as a team in coordinating your care?
Very Poor Excellent
1 2 3 4 5

Specialist Questions: Pain Management

Please rate how well your physician discussed your pain problem, using terms you could easily understand.
Very Poor Excellent
1 2 3 4 5

Please rate how well your physician explained your treatment options. (e.g. pain medication, referral to other specialists, etc.)
Very Poor Excellent
1 2 3 4 5

Do you feel that you were satisfactorily involved with decisions regarding your care?
Yes No

Do you feel that the decisions about your care were appropriate for your individual needs?
Yes No

Generally, do you feel that our office has helped you with your pain problem?
Yes No

Did the physician and staff members treat you with respect?
Yes No

Specialist Questions: Post Op

Please rate how well your procedure was explained to you in terms you could understand.
Very Poor Excellent
1 2 3 4 5

Did you experience any nausea and vomiting when you went home?
Yes No

Were you admitted to the hospital following your procedure?
Yes No

How would you rate the helpfulness and clarity of your homecare instructions?
Very Poor Excellent
1 2 3 4 5

What was your pain level during the procedure?
No Pain
Mild Pain
Moderate Pain
Severe Pain
Worst Pain Possible

What was your pain level the day following your procedure?
No Pain
Mild Pain
Moderate Pain
Severe Pain
Worst Pain Possible

Did you have any signs of infection following your procedure?
Yes No

Please rate how well your procedure was performed in a safe and competent manner by qualified processionals.

Very Poor Excellent
1 2 3 4 5

Please rate how well your procedure was coordinated to provide for convenient scheduling and efficiency of your treatment.

Very Poor Excellent
1 2 3 4 5

Please rate your understanding of what your prescriptions are for, when to take them and what precautions to take in using them.

Very Poor Excellent
1 2 3 4 5

Specialist Questions: Neurology/Endocrinology/Rheumatology

Please rate the helpfulness of the people who assisted you with billing or insurance.

Very Poor Excellent
1 2 3 4 5

Were test results reported in a reasonable amount of time?

Yes No

Please rate the ease of obtaining prescription refills.

Very Poor Excellent
1 2 3 4 5

Please rate the instructions you received regarding medication / follow-up care.

Very Poor Excellent
1 2 3 4 5

Please rate the helpfulness and professionalism of the phlebotomist.

Very Poor Excellent
1 2 3 4 5

Please rate your confidence in our ability to maintain or improve your condition based on today's visit and your doctor's care.

Very Poor Excellent
1 2 3 4 5

Specialist Questions: Pulmonary/Sleep Study

Were you notified of your financial responsibility prior to scheduling your study?

Yes No

Please rate our technical staff's set-up procedures.
Very Poor Excellent
1 2 3 4 5

Please rate our Clinical staff's CPAP demo and explanation.
Very Poor Excellent
1 2 3 4 5

Please rate the electrode removal and clean-up after PSG.
Very Poor Excellent
1 2 3 4 5

Specialist Questions: OBGYN

Please rate how well your obstetrician did explaining the appropriate weight gain you should experience during your pregnancy and reviewing your birthing plan.
Very Poor Excellent
1 2 3 4 5

Please rate your satisfaction with your prenatal care at our practice.
Very Poor Excellent
1 2 3 4 5

Please rate how prepared were you for what to expect during your delivery based on the information you received from our practice.
Very Poor Excellent
1 2 3 4 5

If your visit included a physical exam of any kind, was someone there with you during your examination for privacy reasons (such as a nurse or family member) and were you asked if you wanted someone to be present during the exam?
Yes No

How would you rate the timeliness of receiving your laboratory/ultrasound results?
Very Poor Excellent
1 2 3 4 5

How would you rate the ease or electronically retrieving your laboratory results?
Very Poor Excellent
1 2 3 4 5

Specialist Questions: Optometry/Ophthalmology

Did you visit our Optical Department to select new glasses or contacts?
Yes No

How would you rate your satisfaction with the professionalism and helpfulness of our Optical Staff?

Very Poor Excellent

1 2 3 4 5

How would you rate your satisfaction with the selection of glasses or contact lenses available in our Optical Department?

Very Poor Excellent

1 2 3 4 5

Why did you choose not to visit our Optical Department?

Didn't have time today, but will come back

I can find a better selection elsewhere

I can find better pricing elsewhere

What is your ideal price point?

Less than $100

$100 - $200

$300 - $400

More than $400

Did you schedule your Laser Vision Correction procedure with us?

Yes No

How likely are you to schedule your procedure in the next 6-12 months?

Very Unlikely Very Likely

1 2 3 4 5

If Unlikely, display: ‘Do you mind telling us why you chose not to schedule your procedure with our practice?”

Customer Resources: Templates for Survey Communications

Survey Header Example

At <Practice Name>, we believe you deserve the finest care available. To ensure we are meeting your needs and expectations, please take a moment to complete this brief survey to tell us how we are doing. We welcome your comments and suggestions for improvement.

Survey Invitation Email Examples

Subject: Your visit to <Practice Name>

Dear Valued Patient,

Thank you for your recent visit to <Practice Name>. We are continually striving to deliver the best possible care and patient experience. To help us continue with our quality goals, please take a few minutes to fill out a brief survey about your visit by clicking on the link below.

https:// <Practice Name>.clinectsurvey.com/response/get/2/1

We appreciate your feedback!

Sincerely,

Your Team at <Practice Name>

Subject: Your recent visit to <Practice Name>

Dear {patient first name},

We are glad you chose <Practice Name> for your care. We want to hear about your recent visit. Please take a few minutes to complete our brief survey. Your suggestions and feedback are valuable to us as we strive to offer the best possible care.

Please follow this link to the survey: {survey link}

Thank you very much for your time.

Sincerely,

The Physicians & Staff at <Practice Name>

Survey Invitation Text Message Examples

Thank you for choosing <Practice Name>! Please tell us about your experience by completing a brief survey. Click this link (Survey Link)

Please participate in an important survey regarding your recent visit with <Practice Name> by clicking this link (Survey Link). Thank you for your time!

Positive Touchback Email Verbiage Example

Subject Line: Thank you for your feedback

Dear <Patient Name,>

Thank you for taking the time to provide feedback on your experience with <Practice Name>. We strive for excellence in customer service and greatly appreciate your response.

Your feedback has already helped our practice. I am writing to ask if you would be willing to share your feedback on one of the below review sites, which will help potential patients select our practice. Clicking on the link of your choice below will allow you to rate our practice and add any comments. On behalf of our providers and staff, thank you again for your time.

Google Review

Yelp Review

Facebook Review

Healthgrades Review

(Include personal email signature here)

Negative Touchback Email Verbiage Example

Subject Line: We Appreciate your feedback

Dear <Patient Name>,

Thank you for taking the time to provide feedback on your experience with <Practice Name>. We would like to extend a sincere apology that you were disappointed in our service. We'd greatly appreciate the opportunity to learn more about the specifics of your visit and make things right. A member of our management team will reach out to you soon. If you'd like to speak with our Customer Care Team, please call <Phone Number>.

We look forward to speaking with you and working towards a positive resolution.

Sincerely,

Your Team at <Practice Name> OR (Include personal email signature here)

Customer Resources: Examples of Office Signage: Example 1

ClinectHealthcare

Diagnosing the patient experience

How Did We Do?

Clinect is committed to providing an outstanding level of care for all our patients. As part of this commitment, we would like to ask for your feedback on today's visit.

Shortly after your visit, we will send you a brief survey via email. Please make sure you have provided us with your current email address.

This is your opportunity to tell us what we did well and where we could use improvement. We ask that you please take the time to thoughtfully respond to each question.

We look forward to hearing how we can better serve you.

www.clinecthealthcare.com

Customer Resources: Examples of Office Signage: Example 2

Customer Resources: Additional Resources

User Access

Portal users can be given very specific permissions that will limit the data and sections they can view in the Clinect portal. If users are configured to only see data for specific service locations, rendering providers and/or survey types the data on the Dashboard Graphs and on reports will automatically be filtered to show only what they have access to view. In addition, only the portal sections they have access to will be visible. A user who does not have permission to access Incidents, Analytics, Responses and/or Surveys will not see those sections appear in their portal navigation. The Clinect Account Manager will work with the customer to establish the triggered incidents and associated followers.

1. Survey Data

    a. Providers- Users can be configured to see data for only select rendering providers. The data for any providers a user does not have access to will automatically be filtered out of the Dashboard display and any reports run from the portal. Data will also be automatically filtered out of the Incidents, Responses and Surveys portal sections.

    b. Locations- Users can be configured to see data for only select service locations. The data for any locations a user does not have access to will automatically be filtered out of the Dashboard display and any reports run from the portal. Data will also be automatically filtered out of the Incidents, Responses and Surveys portal sections.

    c. Surveys- Users can be configured to see data for only select rendering providers. The data for any surveys a user does not have access to will automatically be filtered out of the Dashboard display and any reports run from the portal. Data will also be automatically filtered out of the Incidents, Responses and Surveys portal sections.

2. Portal Sections

    a. Incidents- If a user does not have access to Incidents, the entire section will be hidden from them. They will not be able to view, manage, edit, create or follow any triggered or manual incidents.

    b. Analytics- If a user does not have access to Analytics, the entire section will be hidden from them. They will not be able to generate, view, export or save any reports within the portal.

    c. Responses- If a user does not have access to Responses, the entire section will be hidden from them. They will not be able to view any submitted patient surveys, including those surveys attached to incidents. If they have access to Incidents but not Responses, they will be able to see only the question and response that triggered the incident. They will not see the 'View Response' button that pulls up the patient's entire submitted survey.

    d. Surveys- If a user does not have access to Surveys, the entire section will be hidden from them. They will not be able to view the Survey Summary or drill down to view Answers from the Survey Summary.

Triggered Incidents

Incidents that are created automatically when specific responses to select survey questions are submitted are referred to as Triggered Incidents. When an incident is triggered, specific users can be included as automatic followers. All followers are notified via email when they are added to an incident (whether they were added automatically or manually). While there is no limit to the number of triggered incidents you can create and number of automatic followers you can include, there are some best practices to keep in mind. The Clinect Account Manager will work with the customer to establish the triggered incidents and associated followers.

1. Don't sweat the small stuff. Focus on only the most important questions and responses when establishing triggered incidents. If too many incidents are generated users can suffer from 'alert fatigue' and may overlook the most pressing issues.

2. Less is more. Avoid including too many automatic followers. If too many users are included from the start, it can be difficult to establish a sense of ownership. We recommend including 1-2 automatic followers. These users should be responsible for the management of the incident. Additional users can always be added manually if additional assistance is needed to resolve the incident. You don't need to have a fear of missing out. You can still view all incident activity (if your user permissions allow) without being a follower. There are also reports that can be run to keep non-followers informed of incident activity.

3. Get creative. Consider adding automatic followers based on specifics such as location, provider and question nature. For example, assign incidents related to questions concerning a specific location or department to the manager of that location/department.

Thank You Messages

Once a patient submits a survey, we automatically display a thank you page that lets them know their submission has been completed. We also can display a customized page based on their survey responses. The Clinect Account Manager will work with the customer to create the custom thank you page(s) and determine the display triggers.

Example 1- if the patient responded that they would like to enroll in the practice's patient portal, the thank you page that appears for them could be a custom page containing a link that would direct them to complete their enrollment on the practice's website.

Example 2- if the patient responded that they would like additional information regarding an upcoming class or seminar, the thank you page could display those details.

Keep in mind, once they close the page or navigate away that information is gone. These custom pages are best used when you feel the patient is likely to act right away. If you want to create information that the patient can refer to at any time, touchback communications are a great solution.

Automated Touchback Emails

Once a patient submits a survey our system knows how they responded to each question. Our rules engine can generate automated touchback emails based on one or more of those responses. The Clinect Account Manager will work with the customer to establish the automated touchbacks and determine the email triggers.

Example 1- if a patient responded with favorable responses to select questions, we can send them an automated touchback email inviting them to share their experience by posting a review online. Our integration with the practice PM/EHR allows us to know where the patient was seen and by which provider. This means that the online review site URLs can be specific to the service location and/or rendering provider.

Example 2- if a patient responded with unsatisfactory responses to select questions, we can send them an automated touchback email letting them know that their feedback is appreciated and that the practice will be reaching out to them directly (or provide contact information for the patient to reach out to someone in the practice who can attempt to resolve their issue(s)).

Example 3- if a patient responded that they want additional information on the patient portal or a specific service/program offered by the practice, we can send them an automatic touchback email containing the pertinent information.