

ARTICLE

Five best practices to successfully activate online scheduling

| JUN 06, 2024

<https://www.chartis.com/insights/five-best-practices-successfully-activate-online-scheduling>

Provider organizations nationwide face ongoing ambulatory access challenges, especially related to timeliness of care and consumer experience.

Digital capabilities like online scheduling are becoming increasingly important to meet consumer expectations. These capabilities can simplify how consumers find and connect with the care they need, impacting both patient acquisition and retention. More than 40% of consumers prefer online options for scheduling, rescheduling, or canceling routine appointments, according to a [recent survey](#) by Chartis and Jarrard, a Chartis Company.

When patients or their proxies can schedule appointments themselves, providers can increase visit volume, provide a better care experience, and improve efficiency and resource utilization.¹ When implemented effectively, online scheduling includes safeguards to ensure patients schedule appointments accurately, with the right provider, location, timeframe, and visit type.

Benefits of online scheduling



Despite the potential benefits, many provider organizations have not sufficiently invested in online scheduling—most often due to internal resistance or competing priorities. Where provider organizations *have* turned on online scheduling, efforts can still fall short, leading to frustrated patients and limited organizational benefits. When asked why they haven't scheduled an appointment online, consumer respondents to our survey reported reasons such as they are unfamiliar with online scheduling, they can't get an appointment soon enough, or the platform isn't effective. All of these reasons point toward opportunities to improve operational aspects of online scheduling to improve uptake and patient experience.

3

In our experience, achieving the full benefits of online scheduling begins with laying the proper foundation. In this article, we highlight five essential elements to successfully plan for and implement online scheduling.



1. Align online scheduling vision and goals with enterprise strategy

Provider organizations may pursue online scheduling for many reasons, including gaining a competitive advantage, better meeting consumer preferences, increasing provider utilization, and relieving pressure on the organization's existing access points. Organizations should be explicit about their goals for online scheduling because they have implications for the approach and definition of success.

For example, if an organization seeks to secure a competitive advantage, the strategy might require launching new patient online scheduling with priority service lines first. By comparison, if the main priority is to increase utilization, an organization should focus on specialties with high no-show rates so that patients can reschedule appointments online. Meanwhile, organizations should also ensure their access approach advances enterprise goals around health equity. For example, online scheduling intake forms should be available in different languages and collect appropriate patient demographic data (e.g., race, ethnicity, language, sexual orientation, gender identity) and information on social needs.

The organization's overall online scheduling strategy and goals must reflect available (or planned) technology functionality, the market and competitive landscape, and consumer preferences. For example, retail clinics, which often provide more online scheduling and walk-in options, are disproportionately concentrated in major metropolitan areas and in the Southeast and Midwest.² Providers in those locations may need to pursue bolder strategies to remain competitive. Efforts to introduce or expand online scheduling capabilities should begin with a discovery phase that assesses the current state of all scheduling channels; articulates goals for the future; and establishes the working relationship of operational, clinical, and IT stakeholders.

2. Create partnership between operations, clinical leadership, and IT

Operational leadership must drive online scheduling planning and implementation with the information technology (IT) team's full support. Clinical leaders also need to be highly involved and engaged throughout the process. Operational leaders should establish regular touchpoints with clinicians and IT team members to ensure the clinical appropriateness and technological feasibility of planned changes. This collaboration ensures that the implementation process is not only technically correct but also proactively identifies and addresses any operational barriers, such as overly restrictive schedule template build, poor patient guidance to the correct visit, or low portal adoption.

Effective online scheduling activation also requires a strong change management strategy across all roles. This includes clear internal communications to ensure all stakeholders understand what the organization is hoping to achieve, providing regular updates on progress, and addressing misconceptions about online scheduling that could hinder progress.

3. Ensure your scheduling foundation can support online scheduling

Online scheduling builds on an organization's existing technology infrastructure, including scheduling templates and algorithms, which support phone-based or in-person scheduling. In our experience, reviewing (and, if needed, updating) templates and algorithms before activating online scheduling pays dividends by avoiding unnecessary rework and frustration.

Ensuring questions dictated by the algorithms are accessible to all potential patients is especially important for self-service options. Questions should be available at the appropriate reading level, in the appropriate languages, and with appropriate support for consumers who are visually impaired.

If an organization does not complete this foundational work in advance, it often causes limited availability of appointments for self-scheduling or scheduling errors. As a result, patients must call to schedule, and provider and staff lose trust in online scheduling.

4. Plan for phased implementation

Based on the organization's strategy and goals for online scheduling, it's time to develop a phased implementation plan with the timeline for each clinical area, including primary care, specialty areas, and ancillary services. In our experience, organizations should not implement online scheduling simultaneously across all areas. Rather, they should plan for phased implementation, often starting in areas with the most willing and engaged leaders.

Though all ambulatory clinical areas should have online scheduling, a "one-size-fits-all" approach does not work for providers or patients. Instead, organizations should adapt the online scheduling implementation plan to each clinical area. These plans can define specific patient segments and visit types appropriate for online scheduling activation.

After the organization has defined a plan for a given specialty, it should implement that plan consistently within that specialty (rather than customizing at the provider level) to ensure sufficient visits are available online to meet consumer needs. Alternatively, when implementation relies on an "opt-in" approach (when individual providers may decide whether and to what extent they will participate in online scheduling), the results can vary. This leads to confusion and limited availability for consumers and reduced likelihood of reaching enterprise goals.

5. Measure what you want to manage

The organization's definition of success related to online scheduling must reflect its online scheduling strategy and overall context.

For example, a primary care practice may aim to have 80% of flu shot appointments scheduled online. An orthopedic clinic, meanwhile, may build online scheduling specifically for referred new patients to decrease wait times. At minimum, provider organizations need to understand the percentage of appointments that were scheduled online as well as the percentage of provider time or slots available for online scheduling.

Insight into these two metrics will reveal whether consumer adoption or provider schedules are the main barrier to increasing online scheduling.

Provider organizations must pay attention to downstream metrics to understand the full impact of online scheduling, including:

- Standard access metrics (e.g., visit volume and associated revenue)
- Utilization of provider time
- New patient capture
- No-show rates
- Patient experience

Analytics that permit drill-downs across scheduling channels will help leaders understand how online scheduling modalities (e.g., web, mobile, and chatbot) are improving access and impacting associated revenue. Additionally, call center metrics such as average call volume and average calls per completed appointment will highlight the cost savings from online scheduling.

Do more than “flip the switch”

Organizations that thoughtfully deploy online scheduling solutions can gain a competitive advantage and operational efficiencies. However, it's not as simple as flipping the switch to enable the technology. Without the proper operational foundation in place and a thoughtful approach to implementation, provider organizations risk not recouping technology investments and, more importantly, frustrating patients who may then opt to seek care elsewhere.

Digital solutions like online scheduling will remain important for providers to meet patient needs and improve operations.

Regardless of where they are in the online scheduling journey, provider organizations should step back and evaluate their use of online scheduling. Organizations must ensure it is supported by an aligned strategy, consistent implementation approach, and strong foundational elements.

Sources

¹ Peng Zhao, et al, "Web-Based Medical Appointment Systems: A Systematic Review," *Journal of Medical Internet Research*, 19(4), e134, April 2017, <https://doi.org/10.2196/jmir.6747>.

² Nicole Witowski, "Retailers in Healthcare: A Catalyst for Provider Evolution," *Definitive Healthcare* report, May 2023, https://www.definitivehc.com/sites/default/files/resources/pdfs/Retailers-in-healthcare_A-catalyst-for-provider-evolution.pdf.

³ "Consumers' Choice: Connection, Cost, Convenience," Jarrard and Chartis, May 2024, <https://jarrardinc.com/resources/2024-strategic-positioning-consumer-survey-request/>.

© 2023 The Chartis Group, LLC. All rights reserved. This content draws on the research and experience of Chartis consultants and other sources. It is for general information purposes only and should not be used as a substitute for consultation with professional advisors. It does not constitute legal advice.

Our services

[STRATEGIC TRANSFORMATION](#)

[PERFORMANCE TRANSFORMATION](#)

[DIGITAL & TECHNOLOGY TRANSFORMATION](#)

[CHARTIS CENTERS FOR AI & STRATEGIC INTELLIGENCE](#)

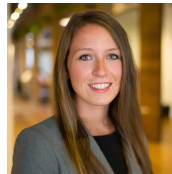
[PAYER TRANSFORMATION](#)

[STRATEGIC COMMUNICATIONS & CHANGE MANAGEMENT](#)

LEARN MORE ABOUT THE AUTHORS



Mike Radtke, MD
Associate Partner



Aubrey Thrane
Associate Partner



Holly Veroneau
Engagement Manager