

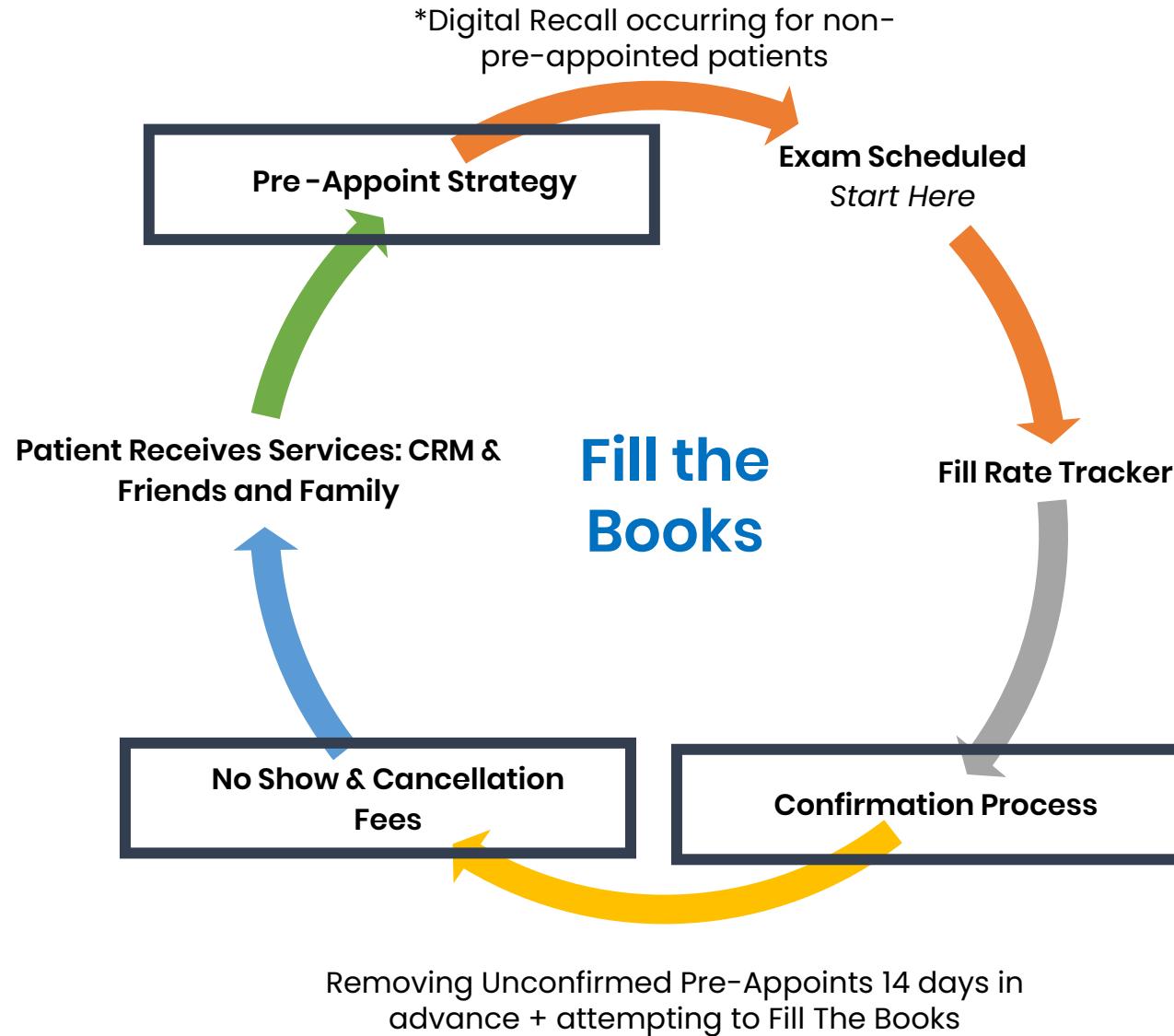
## Recorded Sessions:

- Click [HERE](#) for ECLiPS
- Click [HERE](#) for RevolutionEHR

# LIST YOUR NAME & SITE NUMBER IN TEAMS CHAT



# FILL THE BOOKS & NO-SHOW PROGRAM



# TOOLS & RESOURCES

## Toolkit > Documents > Fill the Books:

- Digital Confirmation Cadance
  - 4PC, Weave, ECLiPS/TAB
- Fill Rate Tool
- Confirmation Best Practices
  - 4PC, Weave, ECLiPS/TAB
- No-show/Late Fee Strategy
- Pre-Appoint strategy
- Tools & Resources

**What are your top 3 actions to focus on??**

## FILL THE BOOKS

Operational Guide

 TeamVision  
Eye care, together.

# PRE HUDDLE ACTIVITY



We are ONE, thanks to many.

**1. Do you pre-appoint all routine patients for their next exam (in Live or NEE schedule)?**

*For example: All patients who receive a refraction*

**SMARTLY Survey Results:** 11 % of sites NEVER & 26% SOMETIMES

**2. Does your site follow a confirmation strategy as outlined on page 8 of the guide?**

**SMARTLY Survey Results:** 5 % of sites NEVER & 18% SOMETIMES

# CONFIRMATION PROCESS

**WHY:** Eye exams are the anchor of a successful optometry practice—clinically, financially, and operationally. They're not just about checking vision – they're the starting point for comprehensive eyecare and providing complete vision solutions which lead to long-term business growth.

## Take the time to observe:

- First impression- what does it sound like?
- Are we communicating the potential no show fees in a positive way?
- Does your team know when to act?
- Do we hear Friends & Family conversations (leverage insurance)?
- Accurate data capture?

# CONFIRMATION PROCESS

**4PC** will assist in patient communication along with in office efforts to confirm patients and help fill your books. Below is a communication overview.

	6 W	4 W	2 W	2 W	5 D	2 D	24 HRS	2-4 HRs
Digital Communication Auto-Triggered with correct PMOC					Email	Auto Call		SMS
Site Action PCC or Call Center	Mail*	Call	Call	SITE ACTION	1 W Call		Call	Optional Call

\*Current locations using postcards can continue to do so, however digital communication is preferred.



Remove unconfirmed pre-appoints and action to fill books with Waitlists, Friends & Family.

# CONFIRMATION PROCESS

Weave will assist in patient communication along with in office efforts to confirm patients and help fill your books. Note this **varies by location**. Reach out to your Field Leader or Caleb Clark ([CCLClark3@luxotticaretail.com](mailto:CCLClark3@luxotticaretail.com)) if you have questions. Below is a communication overview.

Example # 1: T035	6 W	4 W	23 D	2 W	7 D	3 D	24 HRS	2-4 HRs
<b>Digital Communication</b> Auto-Triggered with correct PMOC		Email	Email		Email	Email	Email	
<b>Site Action</b> PCC or Call Center	Mail*	Call		Call + SITE ACTION	Call		Call	Optional Call
Example # 2: True Eye Group	6 W	4 W	2 W	2 W	7 D	3 D	24 HRS	2-4 HRs
<b>Digital Communication</b> Auto-Triggered with correct PMOC					Email		Email	
<b>Site Action</b> PCC or Call Center	Mail*	Call	Call	SITE ACTION	Call		Call	Optional Call

\*Current locations using postcards can continue to do so, however digital communication is preferred.

Remove unconfirmed pre-appoints and action to fill books with Waitlists, Friends & Family.

# CONFIRMATION PROCESS

**ECLIPS(TAB)** will assist in patient communication along with in office efforts to confirm patients and help fill your books. Below is a communication overview.

	6 W	4 W	21 Days	2 W	10 D	1 W	24 HRS	2-4 HRs
Digital Communication Auto-Triggered with correct PMOC			Email		Email	Email		SMS
Site Action PCC or Call Center	Mail*	Call		Call SITE ACTION		Call	Call	Optional Call

\*Current locations using postcards can continue to do so, however digital communication is preferred.



Move/Remove unconfirmed pre-appoints and action to fill books with Waitlists, Friends & Family.

# PRE HUDDLE ACTIVITY



We are ONE, thanks to many.

- 1. Do you remove unconfirmed pre-appointments two weeks in advance to help fill your schedule?**

**SMARTLY Survey Results:** 43 % of sites NEVER & 20% SOMETIMES

- 2. When a patient no-shows, do you mark it in the EHR and follow up with the patient 15 minutes after their scheduled appointment time?**

**SMARTLY Survey Results:** 3 % of sites NEVER & 24% SOMETIMES

# CONFIRMATION PROCESS



<b>Confirmation Objectives:</b>	
1. Clear communication with patients. 2. Confirm the appointment (Fill the Books). 3. Remove unconfirmed pre-appoints and attempt to re-fill the slot.	
<b>1 Month Prior</b> *may vary slightly by practice group	<ul style="list-style-type: none"><li>• <b>Digital communication</b> sent alternating between email/text by communication platform.<ul style="list-style-type: none"><li>• See following pages for additional details by communication platform.</li></ul></li><li>• <b>PCC or Call Center</b> calls to confirm the appointment.<ul style="list-style-type: none"><li>• If patient confirms, mark as <b>Confirmed</b> in E.H.R.</li></ul></li></ul>
<b>2 Weeks Prior</b>	<ul style="list-style-type: none"><li>• <b>Digital communication</b> sent alternating between email/text by communication platform.</li><li>• <b>PCC or Call Center</b> will call to confirm the appointment.<ul style="list-style-type: none"><li>• If patient confirms, mark as <b>Confirmed</b> in E.H.R.</li></ul></li></ul>
<b>PRE-APPOINT ONLY</b> <b>2 Weeks Prior</b> Keep non pre-appoint patients on the books!	<ul style="list-style-type: none"><li>• Remove unconfirmed <b>Pre-Appoint</b> patients.<ul style="list-style-type: none"><li>• Select ECLiPS locations will move appointments to the side of Appt. Book vs. removal.</li></ul></li><li>• <b>Fill in newly opened slots</b> by using waitlists, call upcoming scheduled patients, and Friends &amp; Family.</li></ul>
<b>1 Week Prior</b> *may vary slightly by practice group	<ul style="list-style-type: none"><li>• <b>Digital communication</b> sent alternating between email/text by communication platform.</li><li>• <b>PCC or Call Center</b> will call to confirm the appointment.<ul style="list-style-type: none"><li>• If patient confirms, mark as <b>Confirmed</b> in E.H.R.</li></ul></li></ul>
<b>24 hours</b> <b>Site to Action</b>	<p><b>All patients listed on the books (confirmed + unconfirmed) require a reminder call, text, and or email.</b></p> <ul style="list-style-type: none"><li>• Remind patient of the no show fees if unconfirmed.</li><li>• Optional 2<sup>nd</sup> call same day of appointment.</li></ul>

Click [HERE](#) for Pre-Appoint communication and details.

**No show rate high-  
Remove pre-appoints**

# NO SHOW-LATE FEES | COMMUNICATION



Phone Confirmation



Digital Communication



In Office-Check In

# CONFIRMATION PROCESS

## What should a good confirmation call sound like?

**Sounds Like:** Hi Ms. Smith. This is [Name] calling from [Practice Name]. I'm calling to confirm your appointment scheduled on Tuesday, March 1<sup>st</sup> at 10am. Does that day and time still work for you? Great, please bring all of your current eyeglasses and sunglasses and copies of your insurance cards. We understand things come up, but please know our office has implemented a no-show cancelation fee of \$50. Please cancel or reschedule your appointment 24 hours in advance.

Did we hear Friends & Family?

**Remember-** The objective is not to charge the fee, but to confirm the patient!

# PRE-APPOINT REMOVAL

## Is your process working:

- Are patients confirming?
- What is your no-show rate?
- KPI's- Exams & Fill Rate

## How can you Fill the Books?

- Waitlists
- Friends & Family
- Call upcoming patients



# NO SHOW-LATE FEE | STRATEGY

Why do you think we are launching a No Show-Late Fee Strategy?

How will your practice benefit from this program?

**Your No Show-Late Fee process must be in place by September 1<sup>st</sup>**

# NO SHOW-LATE FEES | STRATEGY

Following up with empathy when a patient misses their appointment is essential. It shows we value their health and time, builds trust, and strengthens the patient-provider relationship. Reaching out to check in and reschedule communicates that we care.

<b>Best Practices:</b> Wait 15 mins past appointment- giving the patient time to arrive.	
<b>Once 15 minutes have passed:</b>	<ol style="list-style-type: none"><li>1. Call patient to reschedule.</li><li>2. When leaving voicemail, mark as a no show.<ul style="list-style-type: none"><li>• This will help accurate reporting so we can follow up with patients</li></ul></li></ol>
<b>MARK YOUR NO SHOW's (MISSED APPOINTMENTS)</b>	

- 10% or less is average (aim for 5%)
- Every location should have a clear strategy in place for following up with patients who don't show up for their appointment (may vary by practice group).

# NO SHOW-LATE FEES | COLLECTION



- **Waiving Fees**– your office should have a standardize practice for all patients, partner with your site Leaders & OD's to align on your process and when exceptions should be made.
- Some flexibility over the first 30 days-we don't want to deter patients from coming to our office.

# NO SHOW-LATE FEES | COLLECTION

**Assessing and Collecting No Show Fee** – When a patient doesn't show or cancels less than 24 hours (without rescheduling), a fee will be assessed.

## TAKE ACTION:

1. Clinic Staff will add fee via invoice on patient record in E.H.R.
2. Print patient statement and mail to patient same day.
3. Void or remove the invoice so that it does not impact patient aging.
4. Create an alert/notification in E.H.R. that patient owes no show fee.

**Invoice Receipt**  
Customer Copy

Jennifer Morgan  
240 Pond Road  
Raeford NC 28376

Next Scheduled Appointment: **None**

**Charges**

Date	Qty	Description	CPT	Diagnosis	Fee	Insurance	Patient
	1	No Show Fee			\$ 50.00	\$ 0.00	\$ 50.00

Total Current Charges **\$ 50.00** **\$ 0.00** **\$ 50.00**

**Payments**

Date	Location	Description	Invoice Line Item	Patient
				No Patient Payments

Initial Invoice Balance **\$0.00**  
Prior Balance Due **\$0.00**  
Total Payment **\$0.00**

**Total Balance Due** **\$0.00**

**Patient Statement**  
Patient Statement

Triangle Visions - Lumberton  
750 Oakridge Blvd  
Lumberton, NC 28358-2324

Morgan, Jennifer  
240 Pond Road  
Raeford, NC, 28376

Statement Date	8/27/2024
Total Balance Due	\$50.00

**IN176358 Details - Jennifer Morgan - Chart# PT179909**

Date of Service	Provider	Qty Description	Fee	Patient
8/27/2024		1. No Show Fee	\$50.00	\$50.00
		Sales Tax	\$0.00	\$0.00
		Total Fee (including Sales Tax)	\$50.00	\$50.00
		Patient Subtotal for Invoice# IN176358		\$50.00

**Additional Information**

Aging Balance	0-30 Days	\$50.00	31-60 Days	\$0.00	61-90 Days	\$0.00	91-120 Days	\$0.00	121+ Days	\$0.00
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**Contact Us** (910) 739-5645

Please fold here, detach and return this slip with your payment

Morgan, Jennifer  
240 Pond Road,  
Raeford, NC, 28376

Statement Date	8/27/2024
Balance Due	\$50.00

Triangle Visions - Lumberton  
750 Oakridge Blvd  
Lumberton, NC 28358-2324

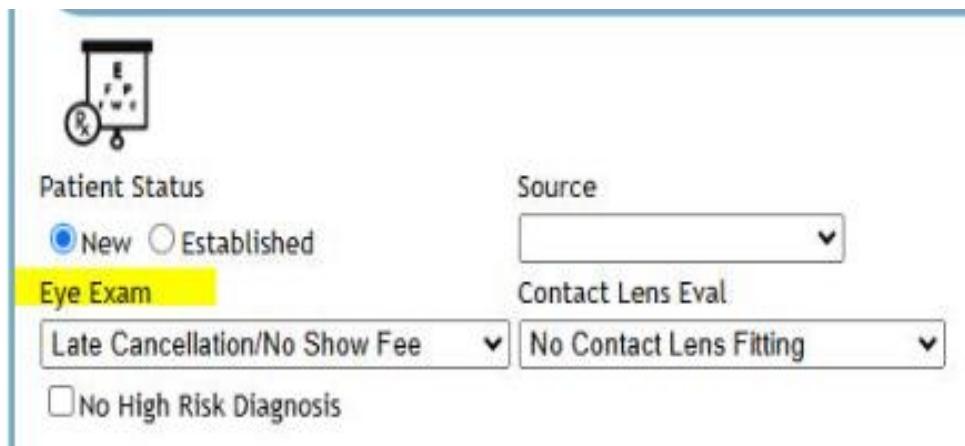
Payment Amount **\$**

Visa  MC  AMEX  Disc  
Card Number   
Signature   
Expiration  /  CVV

# NO SHOW-LATE FEES | COLLECTION

## PATIENT RECEIVES INVOICE:

- **DOES NOT PAY:** Additional invoices will be sent on the 1<sup>st</sup> of the month with the patient statement process/flow. Will follow same process of 4-statement attempt for outstanding balances.
  - Patient cannot be rescheduled until 'no show' fee is paid.
- **PAY:** Patient fills out remittance and sends to clinic. Clinic staff will process payment on date received in Ciao! Optical (credit card, cash, check). Sales will post on this processing date. Payment posted in ECLiPS (net balance \$0).



Patient Status:  New  Established

Source:

Eye Exam: **Eye Exam**

Contact Lens Eval:

Late Cancellation/No Show Fee:  Late Cancellation/No Show Fee

No Contact Lens Fitting:

No High Risk Diagnosis



Doctor Services > Order Worksheet

Category	QTY	Item#	Description	Retail Price
Dr. Service				
	1	20500002644454	OD Service Add On Only - REG	\$0.00
	1	20500002502983	No Show Fee	\$50.00
	1	20500000523652	ADD-ON ONLY PACKAGE ARTICLE	\$0.00
TOTAL:				\$50.00

# PRE-APPOINT STRATEGY

One of the biggest opportunities in our clinics is filling our books. Pre-appointing our current patients is a great way to have continued patient care, by making sure they are booked every year for their annual eye exams.

Check out teams will pre-appoint EVERY patient for the following year – 1 year and 6 days out (for insurance purposes) and give the patient a reminder card with the date and time.

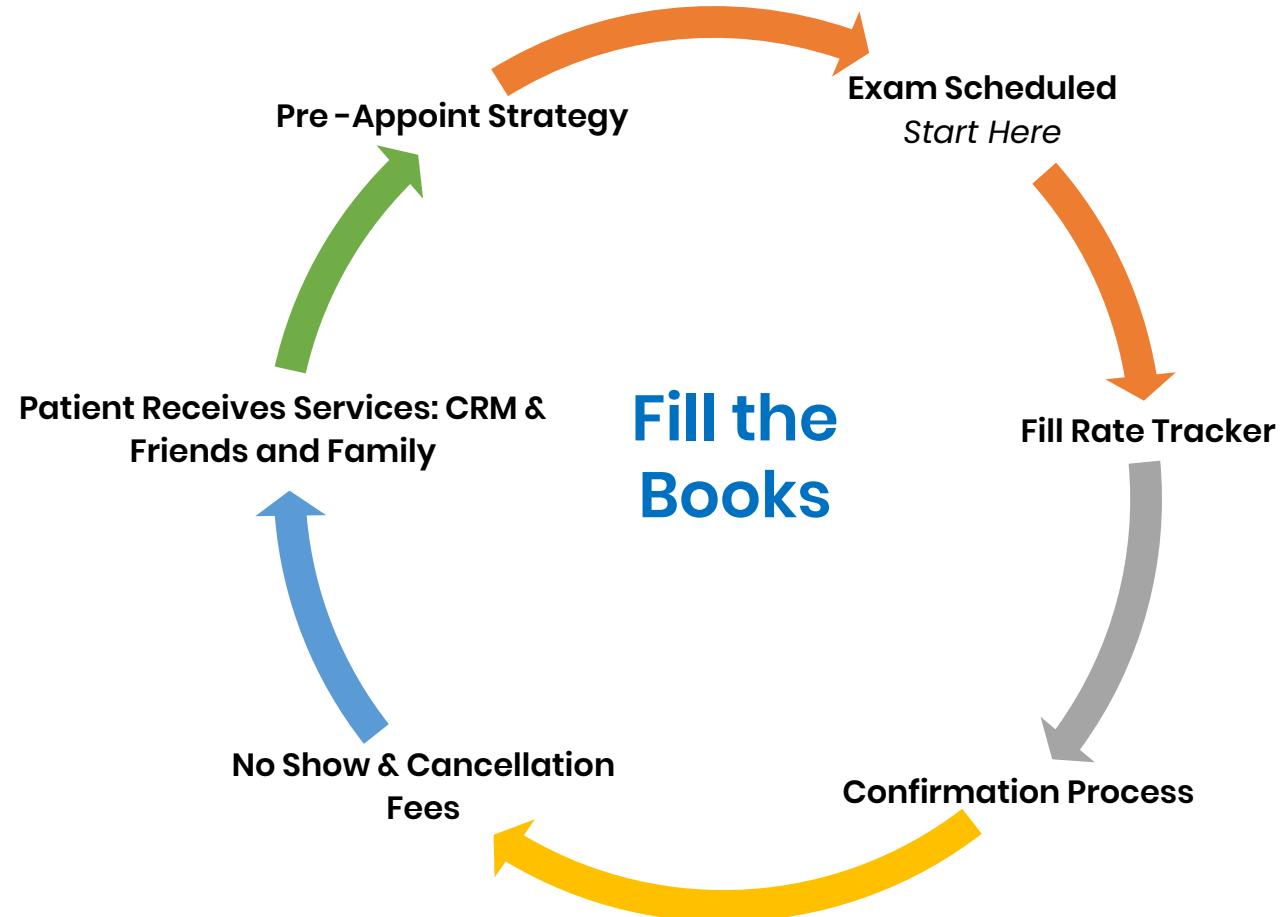
It might **Sound Like:**

- We are going to schedule you for your annual exam next year. Here is a card with the date, time. If you should need to change this exam, please just give us a call and we will take care of it for you. We will also remind you next year a few weeks before your exam.
- The doctor would like to see you next year to monitor your eye health. I understand you can't predict your schedule one year out, but do you have a particular day of the week that usually works well for you? [Patient Responds] Great- let's schedule you one year and one week out on a [state day of the week the patient stated].
  - Patient Objects: Totally understand! If it's okay with you, we'll go ahead and reserve a spot for you now, and we'll send a reminder closer to the date. That way, you have it on the calendar but can always adjust if needed. It's easy to forget these things!

# TIME TO PREPARE

- Identify your Top 3
- Post your No-Show Sign for Launch
  - TVO to switch signs
- Partner with OD & game plan
- Implement your plan

**Measure Success with Fill Rate & Completed Exams**



**Your No Show-Late Fee process must be in place by September 1<sup>st</sup>**