CHAPTER 8

Patient Reception
Lesson 2: Completing a Patient Visit and Closing the Office
Lesson Objectives

Upon completion of this lesson, students should be able to …

• Define and spell the terms to learn for this chapter.
• Describe how to handle the angry patient.
• Describe how to handle a waiting room emergency.
• Explain the procedure for closing the office.
Escorting the Patient to the Exam Room

- When calling the patient, verify the patient’s name with the record and with the patient
- Ask the patient how he/she would like to be addressed
- Offer assistance to those who need it
- Walk at a reasonable pace
- Place patients at easy by pleasantly communicating
The Patient and the Examination Room

- On entering the exam room, place the patient's chart in the proper location, not in the exam room.
- Enter the room with the patient and clearly explain what clothing the patient should remove.
- Explain the use of gown or sheet.
- Assist patients to disrobe if necessary.
- Make every effort to protect the patient's modesty.
The Patient and the Examination Room

- Always ask the patient if he or she has any additional questions you can help them with.
- If discussion is needed, it should be done in a private area out of the hearing range and view of the other patients.
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Ensuring Effective Patient Education

- Ensure that patient education is adapted and provided at a level the patient understands
- Assess the patient’s level of understanding by asking him or her to repeat back what was heard
- If misunderstanding is apparent, revise to an appropriate level and ask the patient to repeat back again
Ensuring Effective Patient Education

- Provide written information for the patient to use as a reference
- Stress the importance of calling the office if more instructions or clarification are needed
- Do not hesitate to ask the physician or another individual in the office who might be able to help clarify information for the patient
Electronic Education Materials

- Easily done if office has electronic medical records
- Software can target patients with certain conditions and then provide e-mails with education materials related to those conditions
- E-mail can be a cost effective way to inform patients of various treatments and procedures
Guidelines to Dealing with Disturbances

- If possible, move angry or loud patients into a separate office area
- Handle the situation as quickly and quietly as possible
- Using a quiet, calm manner, sincerely respond to the patient’s complaint
- Ask the patient to clarify the issue
- Discuss solutions with the patient
- Know the office policy regarding when police must be called.
Guidelines to Dealing with Disturbances

To watch a video on dealing with an angry patient go to MyHealthProfessionsKit.com, or insert the DVD-Rom at the back of your book.
Dealing with Children

- Children of adult patients are allowed in exam room unless privacy is required.
- If child does not follow the adult to the exam room, the MA must ensure the child’s safety while left alone.
- Parents should be informed of the office policy regarding children being left unattended.
- Rarely are children seen by physicians without parents present.
- A medical staff member must be present during a child’s exam if parents are not present.
Handling Medical Emergencies in the Reception Room

- Stop and provide assistance immediately
- Obtain other staff assistance as needed
- Call 911 if necessary
- Move other patients as necessary to ensure the comfort of those individuals
- Start first aid procedures as required
- Refer to office policies on how in-office emergencies should be handled

To watch a video on how to face an emergency go to MyHealthProfessionsKit.com, or insert the DVD-ROM at the back of your book.
Dealing with No Shows

- No shows are defined as patients who do not keep their appointment and do not call to cancel
- A charge may be applied for no shows
- Calling no shows to discover the reason may be office policy
- Physician is typically alerted to any “no shows” on the day of and if a patient has two or more
Dealing with No Shows

• Upon rescheduling the patient, a note should be placed in the record regarding the failed appointment
• A letter sent to the patient by the physician may be necessary
Steps to Closing the Office

Step 1: Allow for 15 to 30 minutes at the end of the day to close the office.

Step 2: Check records for any missing orders and ensure visits have been posted for billing.

Step 3: Pull, review, and collate all records for patients who will be seen the next day.

Step 4: Place the collated records with the charge slips attached and the master list of the next day’s scheduled patients together in the appropriate place.
Steps to Closing the Office

Step 5: Make a copy of this master list of patients for each physician.

Step 6: Deposit in the bank or place in the office safe, all money received from patient payments.

Step 7: Lock all files and or file rooms as well as physician offices and any other individual offices within the medical practice.

Step 8: Turn off all electrical equipment and appliances.
Steps to Closing the Office

**Step 9:** Ensure that all exam rooms are clean and ready for the next day.

**Step 10:** Straighten and clean the reception room.

**Step 11:** Activate the answering service.

**Step 12:** Activate the security system.

**Step 13:** Double check to make sure doors are locked.
Housekeeping 101

For a video on the importance of cleaning the reception area when closing the office go to MyHealthProfessionsKit.com, or insert the DVD-ROM at the back of your book.
Questions?