



Priority Setting Worksheet for Front Desk Staff

From the first call to schedule an appointment, the intake process on arrival, and everything during and after the visit, front desk staff generate the “culture” and experience a patient will have in accessing reproductive health services. The attitude and knowledge of front office personnel can make a big difference in a patient’s willingness to disclose what services they might be seeking when scheduling an appointment, as well as their likelihood to return for any necessary follow-up appointments. As such, offices should ensure that these essential personnel understand the importance of their role and are provided with training and resources to facilitate high-quality interactions with patients.

> How to Use this Worksheet

1. Use the information in the NJ-RHAP PACT to facilitate a discussion about opportunities to adjust behavior or implement new strategies to increase access to care.
2. Use a team-based care approach to identify opportunities that front desk and related office staff can play in making these ideas successful.
3. Based on those goals, identify priorities for each patient interaction for front desk staff. Document those priorities on page 2 of this resource.
4. Use role playing and other interactive methods to practice implementing these strategies, increase staff comfort with them, and demonstrate the effectiveness they can have on the patient experience.

Sample Priorities

1. Provide all patients with a package of comprehensive educational materials to be sent to them in advance of their visit (either by mail, email, or patient portal).
2. If a patient is new or seeing a new provider, share some information about the provider – such as how long they have been with the practice or a specialty they have.
3. Provide patients with a pen and paper while they are waiting for their appointment to jot down questions they may have for the provider.
4. When scheduling appointments, remind or inform patients of things like unique parking situations, or where in the building complex the office is located.
5. Avoid making assumptions about patients, such as their sexual orientation, and using gendered terms, such as pronouns, unnecessarily.
6. Ask questions in a way that does not imply a certain answer is correct or expected, such as “Will you be using insurance for this visit?” rather than “What is your insurance?”

**Note, these priorities should be created in collaboration with front-desk staff and should avoid additional significant administrative burden– as that will decrease the likelihood they are adhered to. These should be revisited on an ongoing basis, as well as when new staff members are onboarded or when there are policy or procedure changes in the office.*

5 PRIORITIES FOR EACH PATIENT INTERACTION: WORKSHEET

Date Completed: _____

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