



A Practical Guide to **Evaluating a Patient Appointment Software**

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Introduction

Appointment booking is usually the first interaction between a patient and a care provider. However, it is well recognised that the process of scheduling appointments for patients is inefficient.

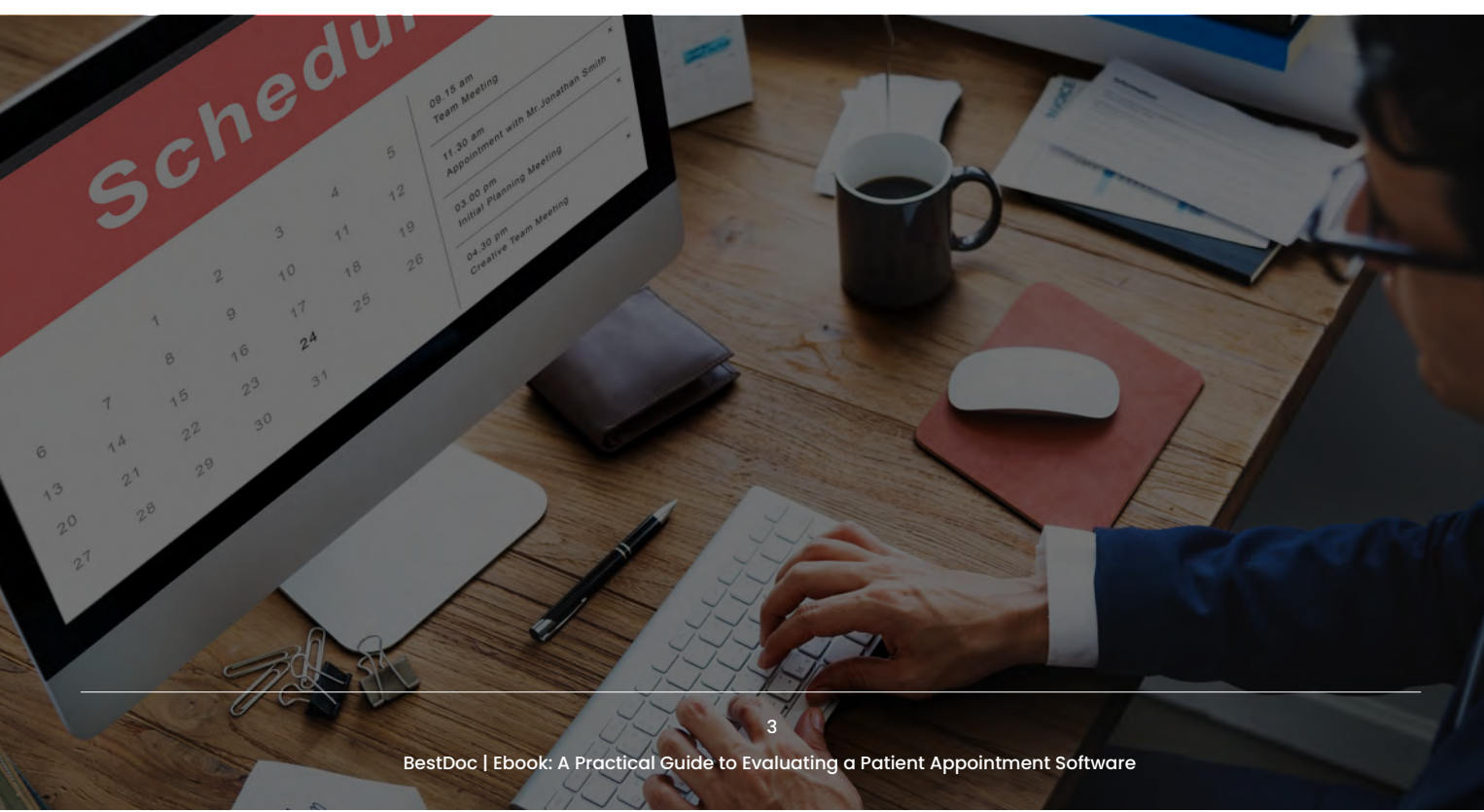
Only 50%¹ of patients are able to book an appointment over the phone on their first attempt, according to statistics. Both small and large healthcare providers face this problem. For example, Narayana Health, one of India's largest healthcare brands, loses 40%² of its potential revenue-generating patient calls. A patient appointment software can help healthcare providers in significantly increasing their appointments, and, as a result, their revenues.

50%

Patients are not able to book an appointment on phone in the first attempt

On the patient side, COVID-19 has disrupted many industries, and healthcare is not an exception. The post-COVID-19 patient will be far more demanding and digitally savvy than the one before the pandemic.

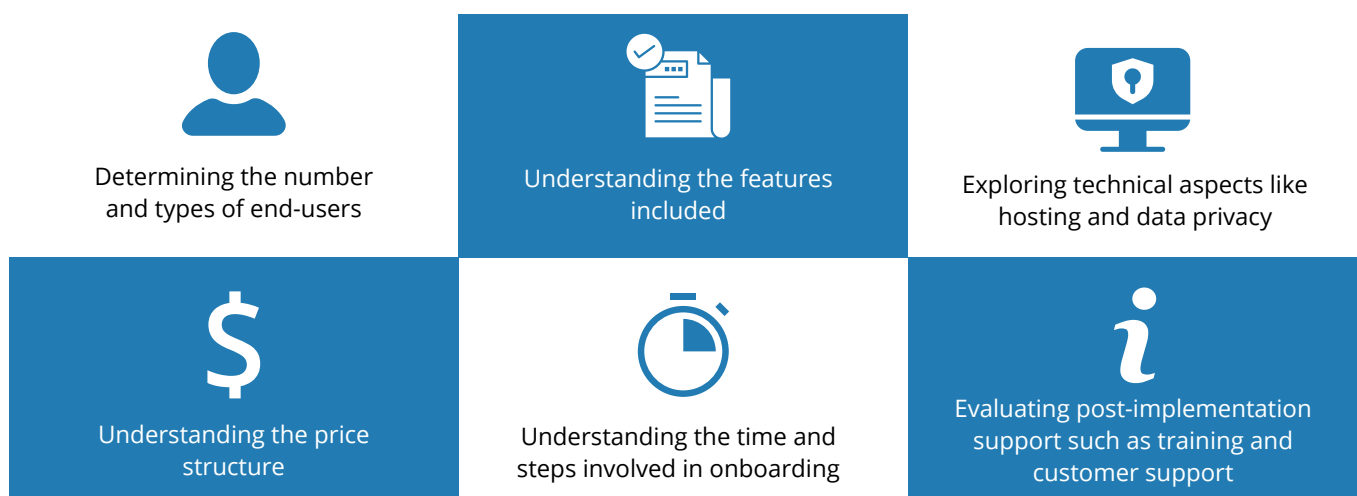
Given this background, no care provider can afford to overlook a patient appointment software. However, with multiple options, picking the right patient appointment software can be difficult. This guide will help you in selecting the best patient appointment software for your specific needs.



Steps Involved in Evaluating a Patient Appointment Software

In the post-Covid era, a patient appointment management software will be a must for your organisation in terms of patient experience, speed, quality of service, and revenues. So, evaluating a patient appointment management software becomes imperative to make the right choice for your organisation.

Here are the main criteria to consider while selecting patient appointment software.



It is helpful to include diverse team members in the decision-making process because they can bring different viewpoints to the table. Key stakeholders who can contribute to the decision-making process include the Operations Team Head, the Patient Relations Team, Head IT, and the Head of Finance.



Determining the Number and Types of End Users





In a smaller establishment, the front-office staff and the doctors would be among the users of a patient appointment software. When the doctors are too busy to take care of the appointment scheduling, the front office will need access to the doctors' schedules, so they plan properly. In other cases, patients may call the front office to schedule an appointment. Here too, the receptionist will need access to the software to book the appointment for the patient.

In a larger establishment, the users might include call centre staff too. Patients are also an important user group, given their growing preference for self-scheduling. You can determine the number and type of end-users based on your specific hospital/clinic workflows.

Understanding the Features Included:

A patient appointment software's features can be listed as follows:

Basic Features

- 01** Book advance patient appointments 
- 02** Book walk-ins 
- 03** Send reminders to patients 
- 04** Make cancellations 



Patient-Centered Features

- Provide a self-service portal for patients to book appointments
- Show doctor qualifications and experience
- Allow searching for a department or a doctor of choice
- Show next available slot if chosen slots are unavailable
- Show fees details for consultations and follow-ups
- Support check-ins (Normal or Contactless)
- Allow services scheduling (laboratory, radiology, etc.)
- Support communication, such as reminders and availability updates, through multiple channels (SMS, Whatsapp, IVR, etc.)
- Give multiple options to make payments
- Send alerts and notifications



Doctor Management & Convenience

- Allow organising daily schedules of doctors
- Create custom OPD schedule for each doctor
- Multi-location capabilities with centralised appointment management
- Doctor session management (leaves, delays, emergencies)
- Allow to enter patient's basic details like height, weight, symptoms, etc.



Support for Administrators

- Token number generation
- Single interface for managing multiple centres, departments, and doctors
- Search patient details by mobile number and UHID
- Print registration barcodes
- Track appointments by statuses (i.e. booked, confirmed, etc.)
- Overbook appointments with waitlist feature



Ease of Scheduling

- Support appointments from multiple channels: Phone, referrals, walk-in visits, aggregators, etc.
- Colour coding and drag-and-drop scheduling
- Matching patients with doctors based on diagnosis and treatment types

Understanding the Features Included (Contd.)



Supporting Optimal Slot Utilisation

- Real-time appointment tracking, including changes and cancellations
- No show tracking
- Alerts for conflicting appointments



Dashboards and Reporting

- Capturing visit duration
- Capturing consultation times
- Capturing waiting times
- Audit features to analyse and reduce inefficiencies



Ease of Use

- Web and browser-enabled
- Syncing to calendars such as Google calendar
- Schedule view for doctor and front desk user
- Live status of schedules
- Pleasant and intuitive user interface

Pro Tip:

You should assess if there is a provision for real-time updating of information. For example: If a patient asks for a reschedule from a particular time slot, will that slot be freed up instantly or will it require manual intervention by the front office/call centre staff. If it is the latter, then the online appointment scheduling system is not effective.

Technological Considerations

Apart from the features, there are several other considerations in evaluating a patient appointment software.

Integrate with HIS or A Standalone System:

Healthcare providers can opt for a patient appointment software that integrates with their HIS or choose a standalone one. The consideration will depend on the size of the hospital.

Integrating with HIS

HIS is the backbone of most hospitals and acts as a single source of truth. Personnel working at the hospital will be familiar with the current work pattern in terms of data, processes, electronic medical records (EMR), and so on. Moving away from a reliable solution like HIS for scheduling appointments will not be the best decision. Integration with HIS is crucial for this reason. This is especially true for mid to large size hospitals. This is especially important so that both the data in the HIS and the scheduling software system can talk to each other, to avoid confusion and provide a seamless experience for the end users.



A Standalone System

The appointment scheduling software may be used independently as a non-integrated option for hospitals that do not have a HIS or do not wish to integrate their scheduling information with their HIS. However, because there is no automated synchronisation between the HIS and the patient appointment software in a standalone system, you may not be able to take advantage of some features such as real-time scheduling updates.

Information Security

Many hospitals are looking for various quality certifications, such as HIPAA compliance, which is a mandatory requirement in several countries. You should check if your patient appointment software is compliant. If not, you should ask whether they have any other certifications (such as ISO 27001).

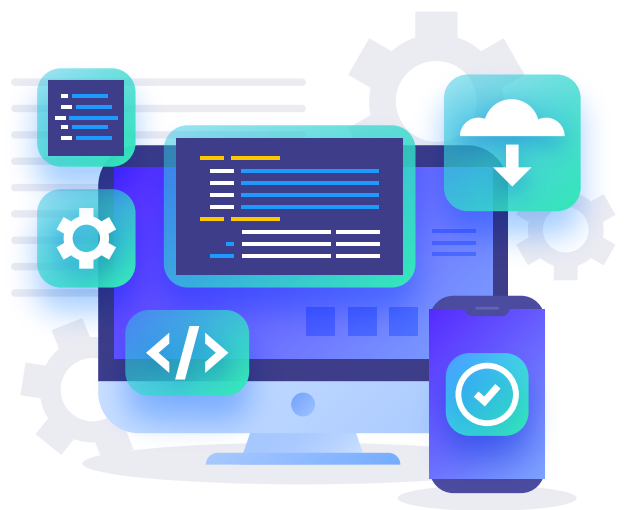
If the solution is integrated with the HIS, you should also understand where your data is stored. You should choose a partner that offers flexible (cloud-based or local) hosting based on your current data storage practices.



Software Customisations and Upgrades

In certain organizations, based on the existing work patterns, there might be a need for customisation of certain features. For all the use cases of the hospital, customisation possibilities would need to be checked and understood to what extent it would be possible. Major customizations usually need the help of the patient appointment software provider. Basic customisation like sending notifications, setting up session timings, etc are built-in, so the hospital's IT team can take care of these independently.

You should also check whether software allows integration with other solutions such as teleconsultation, queue management, feedback system, payments, etc. Opt for a system that supports the addition of new modules and facilitates a seamless flow of information between the systems.

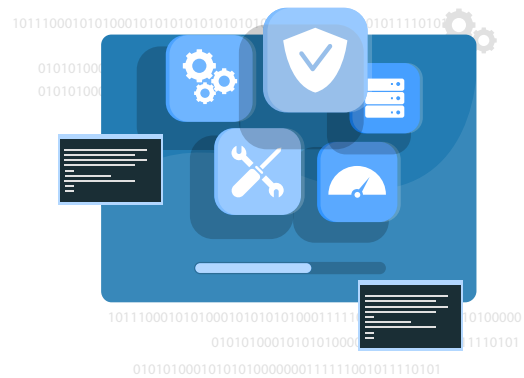


Pro Tip

An appointment scheduling software should not be confused with a medical scheduling software. A medical scheduling software includes additional capabilities that help doctors with the diagnosis and treatment of patients.

Cost of the Software

The appointment scheduling software would usually have two types of payment structures:



Option 1: One-time Setup Cost plus Per Visit Fee

There's a one-time setup cost for activities like setting up hosting (in case of cloud hosting), enabling a web widget for patients on the hospital's website, integration of software with the HIS, creating log-ins for users, etc. A per visit fee includes all the activities related to a single visit. Examples of activities include patient booking an appointment, coming for a consultation, proceeding for a lab test, and so on.

Option 2: One-time Setup Cost plus Per Transaction Fee

In this model, the one-time setup cost would include all the activities covered above. Then, the hospital will be charged for individual transactions, such as booking a slot, moving to a lab test, or cancelling a slot.

In a per-transaction fee model, there's a risk of the hospital paying software fees even for a cancelled visit. However, a counterargument is that in the absence of a patient appointment software, the patient will not have any option to cancel the slot. And the slot may get wasted entirely. With patient appointment software, the hospital can reutilise the cancelled slot and get a sizeable ROI on the amount paid for software usage.

The hospital can negotiate the rates and the right payment structure with the technology provider, based on their budget considerations and their patient behaviour.

Reviews and References

Check out software reviews on platforms like g2.com, capterra.com to get an idea of the features included in different patient appointment software. Some India-based companies may not have many reviews as reviewing B2B software is not a very common practice in the country.

However, it would also be useful to ask the shortlisted technology providers for references of existing customers. This way, you may get first-hand information from three to four hospitals that are adopting their product. This may seem like a time-consuming process, but it can help a great deal in making an informed decision.

Availability of Customer Support

In case of any issues with the software, getting a response quickly becomes very important to ensure there is no downtime for appointment booking. You would need to check if customer support service is available on a 24x7 basis or are they providing support through a chatbot.

Given the importance of patient scheduling, you'll need a technology partner with dependable customer service. It's important to be aware of their response and closing timings.

Time for Going Live

When considering patient appointment software, it's also crucial to assess how much time and effort your hospital's IT staff will need to go live. Depending on whether you're integrating the patient appointment software with your HIS or not, the time it takes to go online will vary. A non-integrated system can be deployed in a matter of days.

Training Support and Time

You should learn whether and how many users the software vendor gives staff training. Typically, for most patient appointment software, basic staff training can be completed within 1-1.5 hours.

Additional Support

Some technology providers, such as BestDoc, also provide extras including a detailed analysis of your scheduling operations and recommendations for improvements. Technology providers have a good grasp of the correct patient scheduling workflows based on their considerable expertise facilitating millions of patient visits.

Bonus: A Checklist for Evaluating Patient Appointment Software

How to choose a Patient Appointment Software?

Key Considerations

- ☒ The number and types of users
- ☒ Evaluating the features included
- ☒ Integrating with HIS or as a standalone software
- ☒ Data privacy: Cloud or local hosting
- ☒ Fee structure: Setup fee plus Per visit or Per transaction fee
- ☒ Time taken for onboarding
- ☒ Training and customer support

Features:

- ☐ Does the software facilitate booking through your hospital's website?
- ☐ Is the software web-based and mobile friendly?
- ☐ Does it support communication through multiple channels (SMS, Whatsapp, IVR, etc.)
- ☐ Is there a feature to search for a department or doctor of choice?
- ☐ Does it allow sharing detailed doctor information, including their qualification, experience and registration, with patients?
- ☐ Is it possible to see the availability of doctor slots?
- ☐ Can you get real-time schedule updates?
- ☐ Does it allow patients to choose their preferred slots while booking?
- ☐ If slots are unavailable for a selected day/time, does the software show the next available slot automatically?
- ☐ Does it allow to show consultation fees and follow-up fees details?
- ☐ Does it allow entering basic patient details like height, weight, symptoms, ongoing medication, allergies and uploading of any existing prescription?

- ☐ Can you search for patient details by mobile or UHID?
- ☐ Does it send alerts for conflicting appointments?
- ☐ Does it support multiple payment options like credit/debit cards, UPI, net banking, and wallet?
- ☐ Does it allow to apply promo codes while paying?
- ☐ Does it send notifications to patients about appointment status and rescheduling?
- ☐ Can you mark “delay alerts” when a doctor is running late?
- ☐ Does it allow to sync information with your existing hospital/clinic app, if any?
- ☐ Does it provide a single interface to manage multiple centres, departments and doctors?
- ☐ Does it support token number generation across individual consultants?
- ☐ Does it allow to print registration barcodes?
- ☐ Does the software allow uploading images?
- ☐ Does it support online booking 24 hours a day, seven days a week, even when your hospital/clinic is closed?
- ☐ Does it allow to create records of diagnosis and other notes for future reference?
- ☐ Does it allow tracking appointments by statuses such as booked/confirmed/no shows/canceled?
- ☐ Can you track no show history?
- ☐ Does it allow to schedule appointments for services (e.g. lab, radiology, etc.)
- ☐ Does it support check-ins (Normal or Contactless)?
- ☐ Does it allow to create a custom OPD schedule for each doctor?
- ☐ Does it help with doctor session management (e.g. managing leaves/delays/emergencies)?
- ☐ Does it capture important details like visit duration, consultation times, and waiting times?
- ☐ Does it allow to sync schedules to calendars, such as Google calendar?
- ☐ Does it provide audit features to analyse and reduce inefficiencies?

Conclusion

It is not a simple task to select the best patient appointment software. You must fully comprehend each provider's solution and match it to your scheduling workflows and needs.

However, it's a long-term investment, and the time spent assessing patient appointment software should help relieve your healthcare professionals' workloads, delight your patients, and grow your business.

About BestDoc

BestDoc is all about making primary health care smart, convenient, and user-friendly. Our vision is to reimagine health care by creating a perfect experience for everyone.

We strongly believe in using technology and data to drive this change and create a better experience for all stakeholders of the healthcare sector. We are progressing towards our vision with our range of products and reputed clients.



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