



American Academy of Ophthalmic Executives®

Tips for Effective Scheduling

Published June 1, 2021

Managing patient flow is a key factor to practice success. Here are six tips for creating an effective schedule.

1. Utilize appointment types	<ul style="list-style-type: none">• Categorize similar appointments based on time and resources<ul style="list-style-type: none">◦ Long versus short, testing equipment versus lasers• Assign these appointment types in your practice management system
2. Create schedule templates	<ul style="list-style-type: none">• Utilize appointment types in template development that guide the end-user• Use reports to identify the appropriate number of appointment types per schedule and physician
3. Implement waive scheduling	<ul style="list-style-type: none">• Specific appointment types made available last minute• Allows for flexibility within a physician schedule
4. Consider resources	<ul style="list-style-type: none">• Schedule templates are dependent on all resources, including:<ul style="list-style-type: none">◦ Physician◦ Technicians◦ Equipment◦ Exam Lanes◦ Waiting Rooms
5. Empower your team	<ul style="list-style-type: none">• Provide solutions to scheduling barriers• Document scheduling workflows and nuances per physician• Cross-train staff. Technicians may need to assist in scheduling patients for efficiency• Assign a schedule coordinator or manager for prompt add-on approval• Review physician schedules a week in advance to determine where disruptions may be• Encourage communication between front and clinical staff
6. Embrace Change	<ul style="list-style-type: none">• Continually evaluate the efficiency of schedule templates• Adjust, as needed, to improve flow or as changes occur• Continue to ask for physician and staff feedback while providing clear expectations for utilization of template