



New York State  
Family Planning  
Training Center  
[nysfptraining.org](https://nysfptraining.org)

# **Tools to Improve Patient Experience in Your Family Planning Clinic**

December 16, 2021

# Objectives

By the end of this webinar you will be able to:

- Describe a process you can use to improve patient experience in your clinic
- Describe how peer family planning agencies applied this process
- Access tools and resources to support you in improving patient experience in your clinic



# Why focus on patient experience?



Patient-centered care improves health outcomes and equity



Positive patient experience improves  
staff satisfaction and engagement





Satisfied patients recommend your services to others.



Clinic Systems

Patient Interactions

Drivers of Patient  
Experience

Clinic Environment

Staff Experience  
and Engagement



**What are you doing to give  
patients a positive experience  
in *your* clinic?**



# Patient Experience Improvement Initiative

**Eight teams participated  
from Oct 20 to May 21**



**All teams made multiple improvements:**



# Patient Experience Improvement Toolkit



New York State  
Family Planning  
Training Center  
nysfptraining.org



About Resources Events Connect with RHNTC

Manage Account & Training  
or Log out

Search



## Patient Experience Improvement Toolkit

Toolkit/Guide

Patient Experience

Title X Family Planning Program

Save



Share



Last Reviewed: 2021-12

Source: RHNTC

### Welcome to the Toolkit

Reproductive health services are personal and sensitive by nature; therefore, it is essential that family planning clinics pay special attention to how patients<sup>1</sup> experience their care. In 2001, the Institute of Medicine named patient-centeredness as one of six health care quality priorities for the U.S. health care system.<sup>2</sup> Since then, health care providers, programs, and insurers have increasingly cultivated patient experience as a central element of health care quality, codifying it into policies and practices, and tying it to compensation structures.

Patient-centered care is respectful of, and responsive to, individual patient preferences, needs, and values.

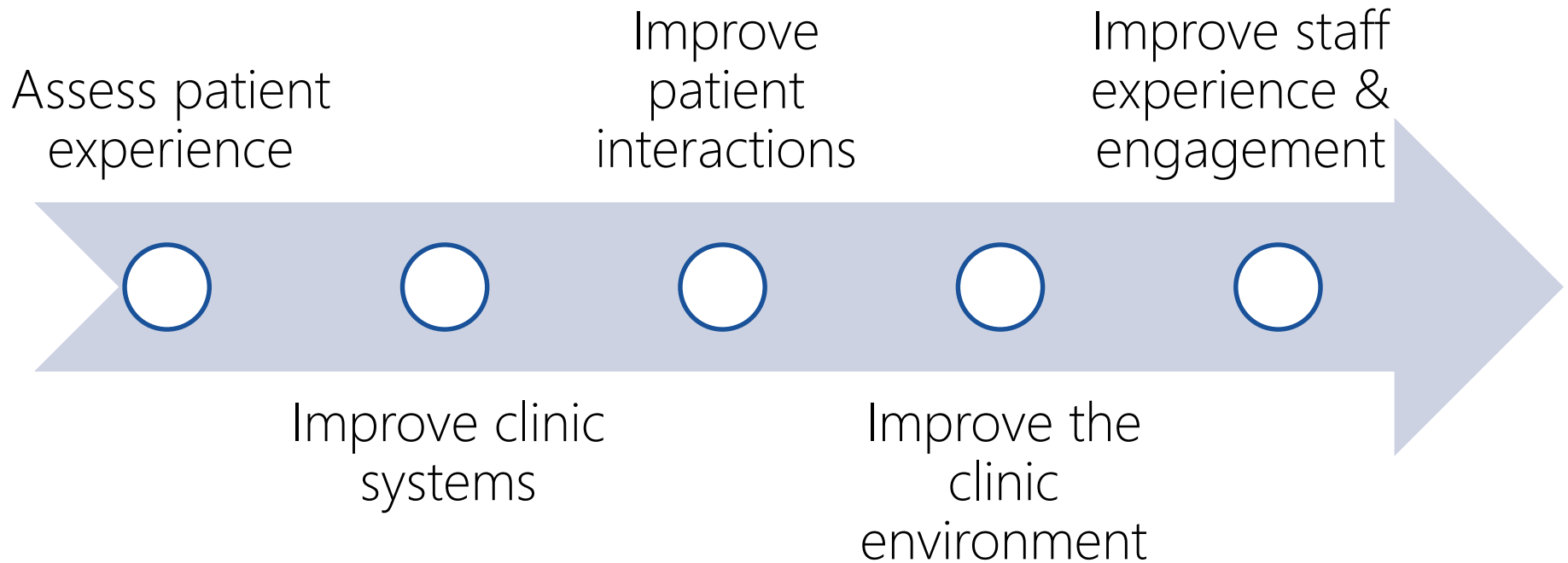
Providing patient-centered, culturally and linguistically appropriate care is a core tenet of the Title X Program. Furthermore, Title X agencies must ensure that people broadly representative of the community have an opportunity to participate in the development, implementation, and evaluation of the project. Involving patients and community stakeholders in assessing and improving how patients experience care is one opportunity to obtain this participation.

<https://rhntc.org/resources/patient-experience-improvement-toolkit>

# Patient Experience Improvement Process



New York State  
Family Planning  
Training Center  
[nysfptraining.org](http://nysfptraining.org)



# Assess Patient Experience



New York State  
Family Planning  
Training Center  
[nysfptraining.org](http://nysfptraining.org)

1. Routinely collect and review data from:
  - Patients (e.g., patient satisfaction surveys, patient observations)
  - Staff (observations about patient experience)
2. Regularly conduct a **community needs assessment** to identify populations with unmet need for family planning services and the barriers that prevent them from accessing these services.

# Satisfaction vs. Experience

## Satisfaction

Measures how patients *feel* about what happened to them

*Example:* Satisfied with wait time

## Experience

Measures what happened to them

*Example:* Wait time was 7 minutes

Both types of data are important!

# Assessment Tools



New York State  
Family Planning  
Training Center  
nysfptraining.org

## Patient Satisfaction Survey

Please tell us how you feel about your experience at our clinic today. Your responses will help us make improvements. This survey is anonymous. Thank you for your time.

Please circle how well we did in the following areas:

	Great 5	Good 4	Ok 3	Fair 2	Poor 1	N/A
--	------------	-----------	---------	-----------	-----------	-----

Ease of getting care						
Time between making appointment and being seen	5	4	3	2	1	N/A

## Encuesta de satisfacción del paciente

Por favor, díganos cómo fue su experiencia en nuestra clínica hoy. Sus respuestas nos ayudarán a hacer mejoras. Esta encuesta es anónima. Gracias por su tiempo.

Por favor, califique nuestro desempeño en lo siguiente:

	Excelente 5	Bien 4	Correcto 3	Regular 2	Mal 1	N/A
--	----------------	-----------	---------------	--------------	----------	-----

Facilidad para recibir atención						
Tiempo entre hacer una cita y ser atendida	5	4	3	2	1	N/A
Tiempo de espera durante la cita						
Tiempo en la sala de espera	5	4	3	2	1	N/A
Personal de recepción						
Cortesía del personal	5	4	3	2	1	N/A
El proceso de registro se explicó con claridad	5	4	3	2	1	N/A
Recibí respuestas a sus preguntas	5	4	3	2	1	N/A
Profesional de la salud (médico, enfermero, partera)						
Cortesía del profesional de la salud	5	4	3	2	1	N/A
El profesional de la salud la escuchó	5	4	3	2	1	N/A
El profesional de la salud se tomó suficiente tiempo con usted	5	4	3	2	1	N/A
El profesional de la salud le explicó con claridad lo que usted quería saber	5	4	3	2	1	N/A
El profesional de la salud le explicó los medicamentos con claridad	5	4	3	2	1	N/A

## Planning to Improve Patient Experience: Staff Meeting Package

START MEETING

DETAILS



Use this staff meeting package to facilitate a team meeting about how to improve patient experience at your clinic. By the end of the meeting, staff will develop a patient experience improvement plan for the clinic.

To prepare for the meeting:

1. Invite family planning clinic staff to participate in the meeting.

This meeting package is designed to facilitate a 2.5-hour staff



# Improve Clinic Systems

1. **Increase appointment accessibility.** Consider:
  - Availability of text/online appointment/reminders
  - Convenience of clinic hours
  - Open access scheduling
2. **Observe patients and staff** to identify opportunities to streamline clinic flow and minimize wait time. Consider:
  - Availability of equipment/supplies in exam rooms
  - Eliminating unnecessary steps and paperwork

# Tools to Improve Clinic Systems



New York State  
Family Planning  
Training Center  
nysfptraining.org



## PATIENT VISIT TRACKING SHEET

Site Name: \_\_\_\_\_ Clinician Name: \_\_\_\_\_ Date: \_\_\_\_\_

Patient Information		Clinic Calculations	
Appointment Time:		Number of Stops:	
Arrival Time:		Total Paperwork Time:	
Departure Time:		Total Wait Time:	
Interpreter Needed:	Yes / No	Total MA Time:	
Gender:	M / F / Other	Total Clinician Time:	
Appointment:	Walk-in / Scheduled	Total RN Time:	
Primary Reason for Visit (circle one)	<b>IE:</b> initial visit <b>AE:</b> annual exam/well-woman visit <b>STD Screen:</b> STD screening <b>BC:</b> birth control <b>IUD Ins:</b> IUD/IUS insertion <b>IUD Rem:</b> IUD/IUS removal <b>PT:</b> pregnancy test <b>HIV:</b> HIV screening <b>Injection:</b> depo injection <b>Implant Ins:</b> implant insertion <b>Problem Visit/Infection check:</b> any other service		

Steps During Patient Visit			Stops (X)	Time Lapsed (# of minutes)					
Start Time	End Time	Description of Step and Observation		Paperwork	Wait	MA	Clinician	RN	Other

## Clinic Flow Assessment



Use this assessment to determine how well clinic flow is working at your site(s). After completing Step 1, consider implementing the actions for improving clinic flow under Step 2 in order to provide comprehensive services in the most efficient way.

### Step 1. Assess Clinic Flow

Which of the following would you say is consistently true about your site? (Check all that apply.)

- ☐ Clients spend less than 5 minutes filling out paperwork.
- ☐ Clients do not fill out the same information more than once.
- ☐ Clients rarely wait to check in for a visit.
- ☐ Clients wait, on average, less than 15 minutes total during a visit. (Waiting is defined as any time the client is not in contact with staff.)
- ☐ Staff take clients' vital signs in the exam room.
- ☐ Staff roles are clearly defined. Multiple staff ask the same questions only if medically indicated (e.g., a clinician following up on a finding of nurse or medical assistant.)
- ☐ Clients are taken to one room and all services are brought to them, rather than moving them to multiple places throughout a visit.
- ☐ Exam rooms are stocked with all materials commonly used (including the provider-dependent contraceptive methods and all associated supplies).
- ☐ Staff do not have to leave the exam room to get equipment, supplies, or paperwork.
- ☐ Staff complete documentation in the exam room and before the client leaves.
- ☐ Clients do not wait to check out.
- ☐ Clients spend, on average, less than 60 minutes in the clinic for a visit, for any reason.

### Step 2. Improve Clinic Flow

Get started with improving clinic flow using the actions and related resources below.

#### 1. Develop staff buy-in for improving clinic flow:

- » Review the assessment tool above. Which items are not checked, and why? Which would you like to be able to check off, and what would you need to get there?
- » Discuss clinic flow with staff. Discuss what's working, and what's not.
- » Watch this [video on patient wait time](#) together as a staff to get the conversation going.
- » Watch this clinic efficiency [quality improvement case study video](#) for inspiration.

# Improve Patient Interactions



New York State  
Family Planning  
Training Center  
[nysfptraining.org](http://nysfptraining.org)

1. Ensure staff capacity to approach patients with sensitivity, respect, and cultural humility
  - a) Learn about the history of racism and abuse in reproductive and sexual health.
  - b) Approach patients with cultural humility and apply strategies to mitigate the impact of personal biases.
  - c) Provide family planning services that are:
    - a) Adolescent-friendly
    - b) Inclusive
    - c) Trauma-informed
  - d) Apply principles of customer service in interactions with patients.

# Improve Patient Interactions



New York State  
Family Planning  
Training Center  
[nysfptraining.org](http://nysfptraining.org)

e) Adhere to National Standards for Culturally and Linguistically Appropriate Services, including:

- Offer no-cost language assistance.
- Inform patients of the availability of language assistance.
- Ensure the competence of individuals providing language assistance.
- Provide easy-to-understand materials and signage.

f) **Monitor quality of contraceptive counseling** with the Patient-Centered Contraceptive Counseling (PCCC) measure.

# Tools to Improve Patient Interactions



This course can help service sites fulfill the Title X program requirement for training on culturally competent care to better meet the needs of diverse populations in the Title X network.

≡ Navigation tutorial



≡ Welcome



SECTION 1: INTRODUCTION TO CULTURAL COMPETENCY IN FAMILY PLANNING CARE

## On-demand trainings:

- ✓ Cultural Competency in Family Planning Care (1.5 CE)
- ✓ Providing Trauma-Informed Care in Family Planning Clinics (1.0 CE)
- ✓ Gender Appropriate Language: Practical Skill Development (0.75 CE)
- ✓ Promoting Youth-Friendly Environments in Family Planning Clinics
- ✓ Language Access 101 (0.5 CE)
- ✓ Working Effectively with Medical Interpreters (0.5 CE)

# Improve Patient Interactions



New York State  
Family Planning  
Training Center  
nysfptraining.org

1. Ensure virtual visits provide a positive experience
  - Review virtual visit flow to identify potential pain points for patients
  - Employ telehealth etiquette
  - Assess how patients experience telehealth visits
2. Ensure written materials are patient-centered, inclusive, and appropriate

## Telehealth Etiquette for Family Planning Visits



The purpose of this job aid is to help Title X family planning agencies provide a positive client experience when conducting telehealth visits. Telehealth etiquette, or "webside manner," is new for many family planning providers and requires attention to detail that differs from an in-person encounter. While telehealth is also sometimes done by telephone, the tips below apply to virtual (video) telehealth visits. Family planning visits conducted via telehealth should be conducted in a private, [HIPAA-compliant environment](#) with adequate privacy.

### Prepare your setting

- Make sure the provider is in a physical space that protects the client's privacy.
- Turn off other applications and potential notifications on your devices; reduce any background noise and silence cell phones.
- Communicate to others that you will be conducting a client visit (e.g., put a "do not disturb" sign on your door).
- Wear clothing that is professional, the same type you would wear during an in-person family planning encounter. Consider wearing a lab coat and/or name badge during appointments. Try to avoid wearing detailed patterns, which can cause distortion on video.



### Test your equipment



- Before the visit, test your audio for volume and clarity and your video for lighting and appearance using your telehealth platform.
- Check the angle of the camera and try to put the webcam at eye level or slightly higher. Your head and shoulders should be centered on the screen.
- Try to position the webcam and monitor (client on screen) as close to each other as possible, so you are looking at the client and maintaining eye contact rather than looking in another direction.
- Use a natural (i.e., not virtual) background to ensure the client knows the setting is confidential, given the sensitivity of topics discussed in a family planning visit.
- Check the lighting in the room to ensure adequate lighting and that you are not backlit.

### Start the visit

- Confirm that you and your client can see and hear each other.
- Confirm consent has been obtained for medical and telehealth services. A sample consent form for family planning services is available [here](#).
- Explain how the equipment being used in a telehealth visit ensures privacy and security.
- Check in with the client to ensure they are in a space that protects their privacy. If the client has concerns (e.g., has been experiencing intimate partner violence or has children in the background during the visit), suggest alternatives to reinforce the client's privacy (e.g., agree on a "safe" word for the client to end the visit with or suggest the client take the visit in a safer setting such as a car, if available).
- Ask the client if telehealth is a new experience. Normalize any discomfort with the virtual platform and answer any questions.





# Improve the Clinic Environment



New York State  
Family Planning  
Training Center  
[nysfptraining.org](http://nysfptraining.org)

1. Protect patient privacy and confidentiality.
2. Identify opportunities to improve the physical clinic space.
  - Consider engaging the community in efforts to make enhancements, such as through volunteers, partnerships with schools or other community-based organizations, or local business donations.
3. Enhance the clinic's website and searchability.
  - Make a list of which changes are within the clinic's control and which need outside support (e.g., through the organization's web services team).

# Tools to Improve Environment



New York State  
Family Planning  
Training Center  
nysfptraining.org

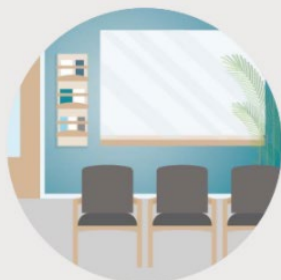
## Tips for Maintaining Patient Privacy and Confidentiality

Ensuring privacy and confidentiality is part of delivering a positive patient experience. This resource includes tips to help both clinic administrators and staff maintain privacy and confidentiality in the clinic.



### Check-in Desk and Waiting Area

- Do not discuss private matters like a patient's name, reason for visit, medical history, or financial information in front of other patients.
- Ensure computer screens, paper charts, completed forms, and any other sensitive information is not visible to clinic visitors.
- Make intake and history forms as short as possible, avoiding personal questions that are not relevant to patients' clinical care.
- Ask patients to sign Health Insurance Portability and Accountability Act (HIPAA) privacy forms.
- Ensure patients have privacy when signing consent forms and completing intake forms.
- Notify patients about their right to confidential services. See a [Sample Patient Bill of Rights](#).



### Exam Room

- Ask all staff to wear clearly-displayed name tags.
- Ensure that patient and staff interactions in exam rooms cannot be heard from the hallway or waiting room.
- Do not discuss patients in hallways or rooms where conversations can be overheard.
- Ask for the patient's permission before bringing staff into the exam room for reasons such as interpretation, assistance, observation, or consultation.
- Introduce staff and explain why staff are in the room with patients.
- Ensure patients can dress and undress in privacy.
- Provide patients with drapes and gowns so they can cover themselves during an exam.



## Clinic Environment Assessment



Use this assessment to help you evaluate your clinic's environment and how it informs the patient experience. Walk through the clinic like a new patient would, from when they arrive through to when they check out after their visit. Check off the characteristics that apply to your clinic. Consider using the [Patient Experience Improvement Plan](#) to address the characteristics that don't apply.

### Navigation a

The clinic can be at Maps, Apple Maps| can contact the ap

The clinic building the street.

Outdoor clinic sign

Signs clearly indica shared building.

The entrance is ob clear signage from

### Outdoor Are

There is free parki

The parking area is

The parking area is

The building looks

There are trees an

Trees and plants ar

## Clinic Website Assessment



Use this assessment to help evaluate how your clinic's website informs the patient experience. Imagine you are a patient as you navigate to and browse your clinic website. Check off the characteristics that apply to your clinic. Consider using the [Patient Experience Improvement Plan](#) to address the characteristics that don't apply.

### Search Results

- ☐ An online search of the clinic's name yields accurate information, including the clinic's address, phone number, hours of operation, and website.

### Website (General Assessment)

Use any device and browser to assess the website characteristics listed below.

#### Function

- ☐ The site menu/navigation bar makes sense.
- ☐ All links on the site are active.

#### Design

- ☐ The website design is aesthetically appealing.
- ☐ The colors on the site are related to the service site's logo.

#### Content

- ☐ The text contains no spelling or grammar errors.
- ☐ There is adequate information about the services available.
- ☐ The site uses language that patients understand and are familiar with.
- ☐ The site uses language that is inviting and judgment-free.
- ☐ The website makes a convincing case for why patients should go there.
- ☐ At least one picture of the facility is shown on the website.
- ☐ The site provides information that services are available regardless of insurance status and patients may be eligible for no-cost services.
- ☐ All educational materials made available to patients (e.g., on the agency's website, through a patient portal, or through other electronic means) have gone through the agency's informational and educational (I&E) materials review process.

# Improve Staff Experience and Engagement

1. Routinely (e.g., annually) assess staff experience and satisfaction to identify opportunities for improvement.
2. Engage staff in patient experience improvement efforts.
3. Foster communication across clinic staff at all levels (e.g., regular huddle).
4. Acknowledge staff that provide excellent care.
  - For example, consider sharing comments from patients received verbally or on patient satisfaction surveys as part of staff meetings.

# Tools to Improve Staff Experience



New York State  
Family Planning  
Training Center  
nysfptraining.org

## Staff Satisfaction Survey



Please tell us how you feel about your job. We value your opinion, and your responses will help us make improvements. This survey is anonymous. Thank you for your time.

Mark how much you agree or disagree with the following statements:	Strongly Disagree	Disagree	Agree	Strongly Agree
The management of this organization is supportive of me.				
I receive the right amount of support and guidance from my direct supervisor.				
I am provided with all trainings necessary for me to perform my job.				
I have learned many new job skills in this position.				
I feel encouraged by my supervisor to offer suggestions and improvements.				
The management makes changes based on my suggestions and feedback.				
I am appropriately recognized when I perform well at my regular work duties.				
The organization rules make it easy for me to do a good job.				
I am satisfied with my chances for promotion.				
I have adequate opportunities to develop my professional skills.				
I have an accurate written job description.				
The amount of work I am expected to finish each week is reasonable.				

## CERTIFICATE

### OF RECOGNITION

This certificate is awarded to

**First Name &  
Last Name**

in recognition of their outstanding dedication to  
delivering excellent patient care.

[Logo Here]

\_\_\_\_\_  
[Clinic Manager Name]

\_\_\_\_\_  
[Date]

# Quality Improvement



New York State  
Family Planning  
Training Center  
nysfptraining.org

- Start with an organizational assessment.
- Organize improvement progress in an Improvement Plan.
- Use a quality improvement approach.

## Patient Experience Organizational Assessment



Clinic staff can complete this organizational assessment to share their observations about how patients experience care at their clinic. Your responses will be anonymous, so please provide your honest feedback. Jot down your ideas for what the clinic could do better in the right-hand column. The clinic administration will then aggregate all responses to identify themes and potential areas of improvement.

Domain	Element	Never	Rarely	Sometimes	Usually	Always	Not Sure	How could we improve?
Clinic Systems	Patients can be seen at a time that is convenient for them.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
	Patients wait in the waiting room more than 10 minutes past their appointment time before they are seen.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
	Patients experience confusion, frustration, or other negative experiences when moving through their visit.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Patient Interactions	Staff welcome patients upon arrival.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
	Staff provide care that is culturally-appropriate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
	Staff provide care that is trauma-informed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
	Staff provide care that is youth-friendly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
	Staff provide care that is inclusive of LGBTQ+ patients.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
	Staff limit distractions, such as interruptions or personal cell phone use, when with and around patients.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
	Staff use friendly words and a friendly tone of voice when speaking with patients.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	



## Patient Experience Improvement Plan

Use this improvement plan to organize and track patient experience improvement efforts in your family planning clinic. Add new rows as needed.

Improvement Goal	Improvement Activity	Who is Responsible	How You Will Evaluate Success of Improvement Activity	Deadline for Evaluating Improvement Activity	Results and Next Steps (fill in when activity completed and evaluated)
<b>CLINIC SYSTEMS</b> Example: Expedite patient check-in process.	Review patient check-in paperwork and identify opportunities to streamline it.	Jacob (Nurse)	Patient time filling out paperwork, gathered through observation.	April 10th	Combined three intake forms into one streamlined form. Average time patients spend filling out paperwork decreased from 12 minutes to 4 minutes.
<b>PATIENT INTERACTIONS</b> Example: Ensure all patients feel welcome at the clinic.	All staff complete the Skills for Improving Family Planning Visits: Staff Meeting Package to practice how to make welcoming statements.	Rita (Clinic Manager) will organize staff meeting; all staff will attend: Jacob (Nurse), Maria (Front Desk), and Tre (Nurse Practitioner)	Patient satisfaction surveys	March 1st	In March, patient satisfaction surveys showed an increase in positive responses (from 85% to 95%) on the question, "Did you receive a friendly welcome?"
<b>CLINIC ENVIRONMENT</b> Example: Protect patient confidentiality.	Put a white noise machine in the hallway.	Rita (Clinic Manager) will make purchase; Maria (Front Desk) will install and test.	Test to make sure we can't hear voices from the hallway in the exam rooms and vice versa.	March 15th	Test successful—white noise machine blocks carrying of voices.
<b>STAFF EXPERIENCE AND ENGAGEMENT</b> Example: Give staff regular opportunities to get support.	Institute twice daily team huddles.	Rita (Clinic Manager)	After one week, ask staff to fill out a brief anonymous survey sharing what is	March 9th	Staff appreciate huddling but find twice daily huddles (morning and afternoon) to be disruptive and

# Panelists



**Felicia Morris-Bolar**  
Senior Director, Planned  
Parenthood of Greater  
New York



**Julie Weisberg**  
Director of Public  
Communications,  
Family Planning of South  
Central NY, Inc.





**What is one idea or tool you heard about today that you'll take back to your clinic?**



New York State  
Family Planning  
Training Center  
[nysfptraining.org](http://nysfptraining.org)

[nysfptraining@jsi.com](mailto:nysfptraining@jsi.com)

# Thank you!