



Promising Practice

Centralize Appointment Scheduling

Problem

When counselors schedule their own appointments they spend too much time making appointments and may also cause delays.

Solution

Centralize appointment scheduling so that counselors can focus on seeing clients instead of scheduling, making phone calls, and other logistical tasks. Use this method for appointments made both when clients call and when they are present in person.

Featured Stories

Sinnissippi Centers in Dixon, Illinois centralized their appointment scheduling at the front desk. This streamlined the scheduling process, which enabled counselors to see more clients, and increased revenues from assessments by \$8,000, a 6 percent increase.

The Center for Drug Free Living in Orlando, Florida started using a multi-person appointment book to schedule appointments for the entire staff at the front desk. Clients already in treatment reported that they were more satisfied because they were able to reschedule appointments on the first phone call instead of having to wait for a return phone call.

Lessons Learned

- If counselors are reluctant to share calendars, discuss their concerns. Test this practice using small-scale cycles and continue to revisit and address their concerns.
- It may be possible to share access to electronic calendars using an application such as Microsoft Outlook.

Tracking Measures

Cycle Measure

- Number of days until next available appointment
- Number of hours spent by counselors scheduling appointments

Data Collection Form

[Next Available Appointment Tracking Spreadsheet](#)

Action Steps

- Plan**
1. Decide how you will rearrange appointment scheduling so that it is centralized.
 2. Collect baseline data for the number of days to the next available appointment and the number of hours counselors spend scheduling

NIATx Aims

- ✓ Reduce waiting time
 - Reduce no-shows
 - Increase continuation
 - Increase admissions

Financial Impact

- Increase revenue
- Increase staff retention
- ✓ Reduce costs



Promising Practice

appointments.

- Do**
3. Have the centralized office staff make appointments for counselors during the next two weeks.
 4. Re-check the number of days until the next available treatment session and the number of hours that counselors spend scheduling appointments.
- Study**
5. Check the fidelity of the change. Was the change implemented as planned?
 6. Evaluate the change:
 - Did counselors spend less time making appointments?
 - Did counselors spend more time with clients?
 - How did counselors react to having their appointments made by someone else?
 - Did clients find appointment scheduling to be easier?
 - Did waiting time decrease?
- Act**
7. Adjust the way that appointment scheduling is centralized or the number of counselors that are centrally scheduled and re-test this promising practice for an additional two weeks.

Repeat this series of steps until all appointments for all of your counselors are made in a centralized fashion.

Related Promising Practices

- [Use All Time Slots Including Special-use Time Slots](#)
- [Make Appointments During the First Call](#)
- [Re-assign Non-clinical Tasks Performed by Clinicians](#)