



Promising Practice

Schedule the First Appointment before Researching Financial Arrangements

Problem

Checking financial arrangements before scheduling the appointment delays treatment.

Solution

Schedule first appointment and admit clients without checking their financial eligibility.

Featured Stories

Racine Psychological Services, Inc. in Racine, Wisconsin reduced the waiting time for the first appointment from 16.7 days to 8.5 days by scheduling appointments before determining the co-pay. They found that nearly all of their clients had financial coverage and co-pay information could be determined between the first contact and the initial appointment. Payers approved payment even after the client was initially seen.

Perinatal Treatment Services in Seattle, Washington eliminated the three-week delay caused by the county doing an assessment to authorize payment. They asked the county payer if they could do assessments for pregnant women at the residential program, as a pilot test. The county agreed, provided that they got a copy of the assessment results. The county later changed the process for all providers.

Lessons Learned

- Some agencies found that most clients requesting help had financial coverage and it was not necessary to confirm coverage before the first appointment.
- *Caution:* Some agencies found that payers required pre-authorization.
- *Caution:* Some agencies found that their collections dropped if they didn't collect financial information before the first appointment.
- Evaluate the real risks involved in performing an assessment without being certain that you will get paid. Consider the possibility that you may be able to determine how the client will pay for treatment during the assessment appointment.

Tracking Measures

Cycle Measure

Number of days between first contact and the first scheduled appointment

Data Collection Form

[Next Available Appointment Tracking Spreadsheet](#)

NIATx Aims

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

Financial Impact

- Increase revenue
- Increase staff retention
- ✓ Reduce costs



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Action Steps

- Plan**
1. Collect baseline data for the number of days between first contact and the day the first appointment is scheduled.
 2. Select one payer for which you will suspend financial eligibility checks prior to scheduling first appointment.
- Do**
3. Suspend financial eligibility checks until after the first appointment is scheduled for either all clients or for selected payers for two weeks.
 4. Re-count the number of days between first contact and the day the first appointment is scheduled.
- Study**
5. Check the fidelity of the change. Was the change implemented as planned?
 6. Evaluate the change:
 - Did the hours required to check financial eligibility decrease?
 - Did collections increase, decrease, or remain the same?
 - Did the number of days between first contact and scheduling the first appointment decrease?
- Act**
7. Adjust the number of clients or the selected payers and re-test this promising practice for an additional two weeks.

Repeat this series of steps until you are satisfied that waiting times are decreasing without losses in revenue.

Related Promising Practices

- [Eliminate Excessive Paperwork](#)
- [Make Appointments During the First Call](#)
- [Establish Walk-in Hours](#)

More Stories

Specialized Outpatient Services in Oklahoma City, Oklahoma reduced the waiting time for assessment from 15 days to 4 days by suspending financial eligibility requirements. They also cross-trained staff, added groups, used all time slots, and added more phone lines to increase the accessibility and availability of open lines and to streamline calls.

Oklahoma Department of Mental Health and Substance Abuse Services in Oklahoma City, Oklahoma reduced the waiting time for outpatient treatment from more than 30 days to 3 days and decreased the average waiting time for treatment by 45 percent across three pilot sites by suspending financial eligibility requirements. They also eliminated extensive paperwork, delays in client engagement, and time to treatment.

Oakwood Clinical Associates in Kenosha, Wisconsin reduced the waiting time for assessments from 15 days to 11 days by scheduling the assessment appointment during the first contact instead of after investigating financial coverage.