MMP Classic: How to Apologize to a Patient

I like to get complaints from patients.

No, I’m not a glutton for punishment. What I like about complaints is that I hear directly from the patient what is bothering them, and I have an opportunity to connect with them personally. The ideal situation is having the opportunity to meet face-to-face with the patient when they are in the office.

Here’s how to apologize to a patient.

Step One: Introduce Yourself

I introduce myself and shake the patient’s hand and the hand of anyone else in the room.

Step Two: Sit Down

I sit down. There are two reasons for that. One is to send the message that they do not need to hurry – this conversation can take as long as they need it to. The second is to place myself physically below the patient. If they are in an exam room sitting on the exam table, I will sit in the chair. If they are sitting in the chair, I will sit on the step to the exam table. The message I am sending is “I do not consider myself to be above you.” It sends a strong message.

Step Three: Let Them Tell Their Story

I say “*I understand we have not done a very good job with __________ (returning your calls, giving you an appointment, getting your test results back to you, etc.) Can you tell me about it?*” I do not take notes as I want to maintain eye contact and focus on the patient, but I take good mental notes. The patient and/or anyone with them needs to be able to talk as long as they want. They might need to tell their story twice or many times to get to the point where they’ve gotten relief. The patient has to get the problem off their chest before the next part can happen.

Step Four: SINCERELY Apologize

I apologize, saying “*I’d like to apologize on behalf of the practice and the staff that this happened. I want you to know this is not the way we intend for _______ to work in the practice.*” If anything unusual has been happening, a policy has changed, or new staff have been hired, I let them know by saying *“So-and-so has just happened, but that’s not your problem. We know our service has slipped, but we’re hoping we are on the way to getting it fixed.”*

Don’t forget that patients can tell if you are not being sincere when you apologize.

Step Five: Answer Questions

Answer any questions the patient has. Why did the policy change? Why can't I get an appointment when I need one? How will you fix this for me?

Step Six: Close the Meeting

If the patient complaint requires an investigation and resolution, I give the patient a date when I will be back in touch with more information. If the patient complaint does not require any resolution on the patient side, I offer my name again and give them a business card or a way for them to contact me if they have further problems.

Step Seven: Resolve the Situation

I follow-up on the information the patient has given me to find out where the system broke down or where a new system might need to be developed, and if needed, contact the patient with further information and/or resolution.

Although most people prefer not to hear complaints, paying close attention to patient complaints helps a manager to keep a pulse on the practice, know what patients are struggling with, and of course, practice humility. All good stuff.

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5 Ways Technology Can Help Your Patient Relationship

Management

Patient relationship management is about more than just healthcare issues; it's about building a connection that leaves your patients feeling that you genuinely have their personal interests in mind. We all love to be recognized, and your patients appreciate it when you recall what their children's names are, what you discussed with them during their previous visit, and where they went for their vacation.

It's pretty impossible to keep track of everything if you have several hundred patients, however. That's where technology can help you. Remember the old box of patient card files on which you'd make notes? Now, keeping track is just so much easier with the various tools available to physicians.

#1: Keep Electronic Records

If you're a typical technophobe and don't relate well to unfamiliar software programs, your record-keeping can be as easy as a Word or Text document for each patient. Set up a template for yourself that lists the data you want to keep track of, and simply enter the information into the file after each patient visit. Information could include fields such as:

- Personal info
- Family details
- Chronic illnesses
- Allergies
- Medication
- Visits

As long as you update the patients' records diligently after every visit, this patient relationship management system will work for you, although it doesn't enable you to communicate regularly.

#2: Use a Spreadsheet

A slightly more sophisticated way of keeping records than basic documents, Excel spreadsheets offer data sorting abilities that are useful. You can also keep all your patients' information in one file, which saves you having to track and open multiple files. Use the worksheet tabs to categorize and group patients by type of illness or some other criteria that's meaningful to you.

#3: Set Up a Database

There are multiple free and paid database programs available that you can use to set up a patient relationship management system. From Microsoft Office's *Access* program through to Apache Open Office's *Base,* and the software will not only store the information you add but generate reports, graphs, reminders and a mailing list that you can use with an email marketing program for communication purposes.

#4: Get a CRM Program

Commercial CRM programs such as InTouch CRM and BatchBook enable medical practices to store patient information,communicate via email or text message, and keep track of message opens and click throughs. A customized CRM program can do the same for your practice. Not only does the program have the ability to store all relevant information about each patient, but you can set up alerts to identify critical changes in the patient's condition based on data input from one visit to the next – without having to do a manual evaluation.

The patient relationship management program compares current data with data from previous consultations, such as blood pressure readings and cholesterol screening results. If the comparison generates an alert, you can proactively contact the patient to discuss it. At the same time, the system can generate automatic emailing of information to the patient to help educate him.

#5: Implement a Patient Portal

Cream of the crop is the digital patient portal, which enables you to store all information about your patients including test results. Patients get a secure login that lets them view their health records as well as make appointments online or communicate with you via a question facility or a discussion forum. You can set up automated emails based on criteria such as birthdays (personal info), allergies (seasonal) and medication refills needed.

Whatever method you choose to help you with your patient relationship management, keeping the information up to date is vital to enable it to be successful.

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Technology and Healthcare: Breaking Down Doctor-Patient Barriers – Guest Post by Howard J. Luks, MD

Mary Pat's Note: *I want to share these thoughts about technology and the doctor-patient relationship from Dr. Howard*

Luks. Dr. Luks is a member of the Mayo Clinic Center for Social Media, a fantastic follow on twitter, and originally posted these on his site, which is a recommended read for anyone interested in healthcare.

Technology conjures images of steel and gadgets. Parts and pieces. Bells and whistles. It's sophisticated. Intriguing. High tech. But it's well… cold and impersonal. Or is it? Many of us have witnessed firsthand the things that distance patients from doctors. Status. Knowledge. Jargon. Peculiar equipment. Rushed visits. Should we add technology to the mix?

A few short years ago, some health experts refuted efforts designed to progress the use of technology in healthcare. They insisted that technology would distance patients from doctors, who would increase their focus on "dissecting" and "diseases" rather than "emotional connection" and the well-being of their patients. Yet, recent reports have focused on the converse: how technology is bridging the doctor-patient gap, rather than widening it.

Convenience

The most obvious benefit to using technology in healthcare is convenience. With progressive electronic medical records, physicians, referral sources and diagnosticians can share data with ease and speed, thus enhancing and expediting patient care. Patients can also view their own test results, refill prescriptions and send and receive messages from key healthcare professionals, in as close to real time as possible. In today's high-speed living, this benefit remains apparent and immeasurable.

Transparency

Google makes finding answers to almost anything possible. While doing solo searches may not glean the most accurate or comprehensive information, most people can grasp the basics when they dedicate time and energy to learning about a condition or a treatment.

Technology also assists patients to research doctors, practices, hospitals and centers in order to determine a good fit. Although not always reliable sources of information for upstanding physicians (there will always be a customer who is dissatisfied and who will be more likely to write negative online reviews), reviews of truly unethical practices will clearly stand out. With such visibility, patients can make informed decisions about their care. Of course, this can backfire. Perpetual “doctor shopping” can become a deterrent to good health. A 2010 study noted that patients who had a consistent relationship with a single physician experienced both better health and better satisfaction with their care than those who didn’t. And a recent Consumer Reports survey stated that 76 percent of primary-care physicians surveyed said that establishing a long-term relationship with a doctor is the most important factor for patients to receive better medical care. Yet, online quality searches offer a good starting point for patients.

With technology, the trend has been to become your own advocate, and patients have grown an interest in understanding their health. With advanced technology, patients themselves can experience their conditions firsthand. This often enhances buy-in and follow-through on physician recommendations. In one study, cardiac patients who had the opportunity to see their heart scans were more likely to follow recommendations to reduce their risk, such as losing weight.

The Changing Role of Physician

The advent of technology in healthcare in recent years has extended beyond the one-way measures designed for patient and professional convenience, like electronic charting, e-scripts and looking up test results. Now, patients, themselves, can do their research online, unearth information from consumer-driven TV marketing, and use apps designed to track, treat and prevent ill health. This has shifted the physician role to one of interpreter, advisor and coach. Dr. Robert Rowley, a family practice physician in Hayward recently wrote, "Patients, when they come to the doctor seeking health care, aren't necessarily looking for 'raw data' – they have already looked it up online. Instead, they are looking for meaning." This role shift severs the patriarchal, hierarchical, authoritative relationship that physicians have traditionally had (or were perceived to have had) with their patients. And that's a good thing. While doctors will retain the utmost expert medical understanding due to their training and extensive experience, with a more collaborative approach comes the patient's vested interest in their well-being. This can only serve to improve the health of many.

Personalized Care

When all is said and done, what really matters to any human—physician, patient or otherwise—is that they mean something, and that they are treated with respect and dignity. Treating people like objects in any relationship—employer/employee, husband/wife, or patient/doctor—never works. We get ourselves into trouble any time we view people as objects, as means to an end—patient appointments as a means to pay overhead; a sensitive prognosis discussion or phone call as a deterrent to catching up and leaving on time. Yes, we need limits. But not cold and harsh ones. Technology, especially social media and videography, within the confines of ethics, has broken down barriers to allow doctors to see patients as people (and vice versa, to a limited degree) and to celebrate them as such. It’s hard to ignore or forget a post about a new baby, a move, or a family death. While the realities of running an efficient practice can’t be ignored, people certainly can’t.

Technology, it seems, is a winner. It’s here to stay. After all, people across the world connect with Google and Skype, navigation bars and Tweeting. Let’s use it to our patients’ advantage, in “service of humanity… with conscience and dignity.”

Howard Luks, MD (@hjluks), recognized by US News and World Report as one of America’s Top Sports Medicine Surgeons, is an Orthopedic Surgeon who practices in both Westchester and Dutchess Counties in New York. As an early adopter of Twitter, Howard Luks MD also runs a blog, a Facebook Page, a YouTube channel and a personal site to educate, interact and engage his patients. Thanks to his social capital and proven ability to reach a global healthcare audience, Howard Luks MD serves as a Strategic Advisor to many mobile health care start-ups and Venture Capital firms with strong health care related portfolio companies. With improved visibility and online credibility, Dr. Luks is actively utilized to engage his colleagues to join him in participating in the Health 2.0 movement, content creation, outbound marketing strategies and strategic content management.

Dr. Luks (pronounced “Lucks”) says “my presence online is to support the spread of meaningful, trustworthy, evidence based (when available), actionable information and guidance to patients and consumers from around the world. I feel that physicians have a moral obligation to fill Google’s servers with quality content to drown out the commercialized nonsense that exists online today.”