2021
PATIENT PRISM
TRAINING GUIDE

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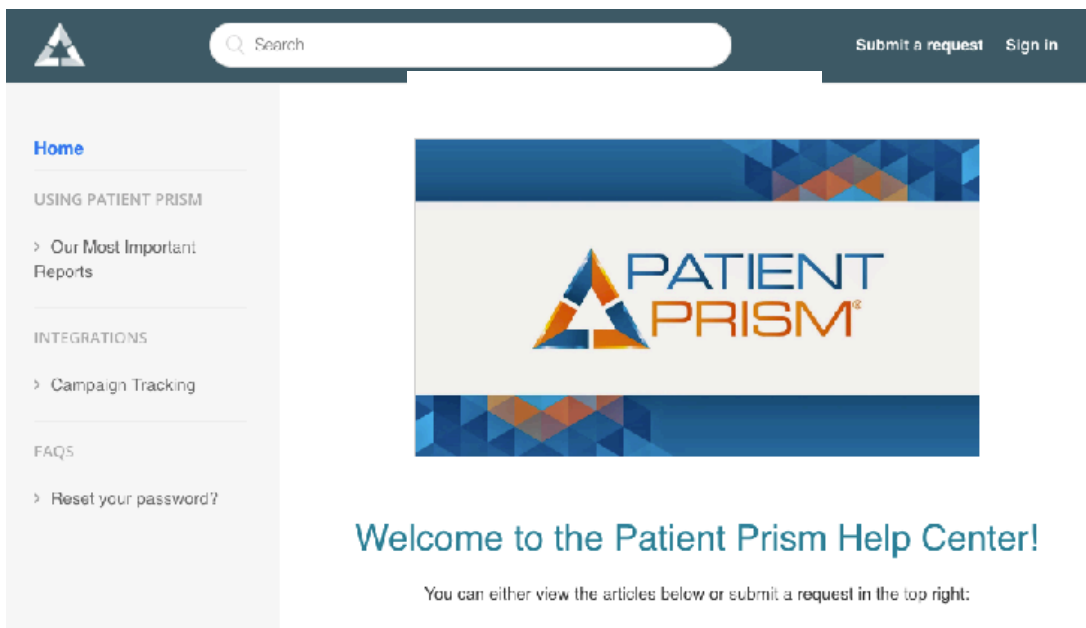# REQUEST SUPPORT

Email
Send or forward an email to support@patientprism.com.

Doing so will create a ticket in our support system and we will be able to work on it that way

Support Center
Main page: https://support.patientprism.com/hc/en-us

Go to the link on the top right of the page and it will bring you to the page to submit a ticket:
https://support.patientprism.com/hc/en-us/requests/new

LOGIN FAQ

Want to add a user?
Please submit a request using either of the two methods above. Provide the name of the user(s) to be added along with their associated location(s).

If you would like them to log in, we will need an email address to add to their account.

If added with an email address, they will receive an email to create a password.

Google Chrome browser is the best for this step.

Unable to login?
If you are unable to log in, the issue is usually a password mismatch.

Please access the link below for assistance
https://web.patientprism.com/forgot-password.

Have a question about a call?
Please submit a request using either of the two methods above.

Let us know the question/concern you would like to have answered.

Copy the call link using the button to the right then paste it in the request.

LOGIN FAQ (cont.)

To help with the login process:
Be sure to remember that your password must be typed in exactly as you set it up initially. If you copy and paste the password, be sure not to copy blank spaces. Blank spaces in the beginning or end of your password will not allow you to log into Patient Prism.

Internet Explorer Browser is not compatible with Patient Prism. Google Chrome is preferred; however, MD Edge, Firefox, and Safari also will work.

Please be sure to add no-reply@patientprism.com to your email contact list to ensure alerts and password reset messages do not get blocked as spam.

If you do not receive your password after initiating your account or requesting a new password, please check your spam folder.

If using Microsoft Outlook / Exchange email, ask your administrator to allow emails from no-reply@patientprism.com and add to your contacts.

If you auto-saved your old password to auto-fill when Patient Prism loads and you subsequently reset your password, you need to change your password.

If your password auto-fills in your browser, do the following. Log into Patient Prism with your new password by opening up an incognito session within Chrome. This is done by holding down "Control / Shift / N" at the same time in the Chrome browser, then going to web.patientprism.com and inputting your username email and new password.

After reviewing all of the above solutions for logging in, if you are still not able to access Patient Prism, please Submit a Request: https://support.patientprism.com/hc/en-us/requests/new

COACHING CRITERIA

To optimally coach each of your calls, Patient Prism has broken each coached call down into four phases. The following items are recommended to be discussed during each phase:

Greeting and First Impression

- Announce Name
- Offer Assistance
- Use Inviting/Positive Tone
- Clearly Greet the Caller
- State Business Namee

## Uncover and Build Relationship

- Ask About Discomfort
- Show Empathy
- Address Caller's Concerns
- Actively Listen to Patient
- Collect Name & Phone Number

Integrity Selling and Interview

- Ask Questions to Learn Needs & Desires
- Answer Caller's Questions Knowledgably
- Discuss Insurance Coverage or Mention Financing and/or Discount Club
- Offer Free Consultation (if possible)
- Offer Appointment Time/ Date

Convert and Reassure

- Ask Referring Source
- Make a Strong Effort to Book Appt.
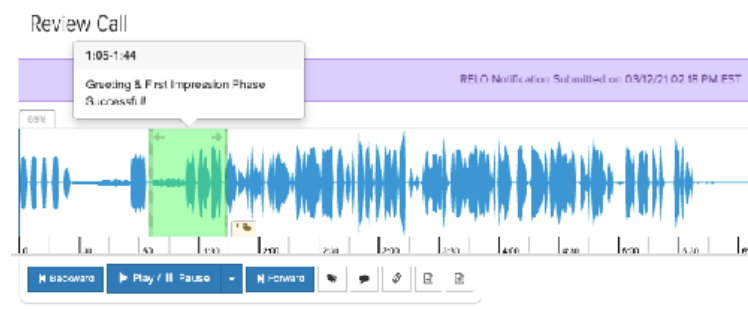
PERFORMANCE REPORT

Easy steps to access Performance Report:

1. Select the "Analyze" module.
2. Select the "Reports" module.
3. Select the "Performance" module.
4. Select your location.
5. Select your date range in the upper right corner.

Please note that the date range will automatically populate to the last 48 hours. The date range can be modified by clicking on the dates and selecting a preset date range, or by entering a custom date range.
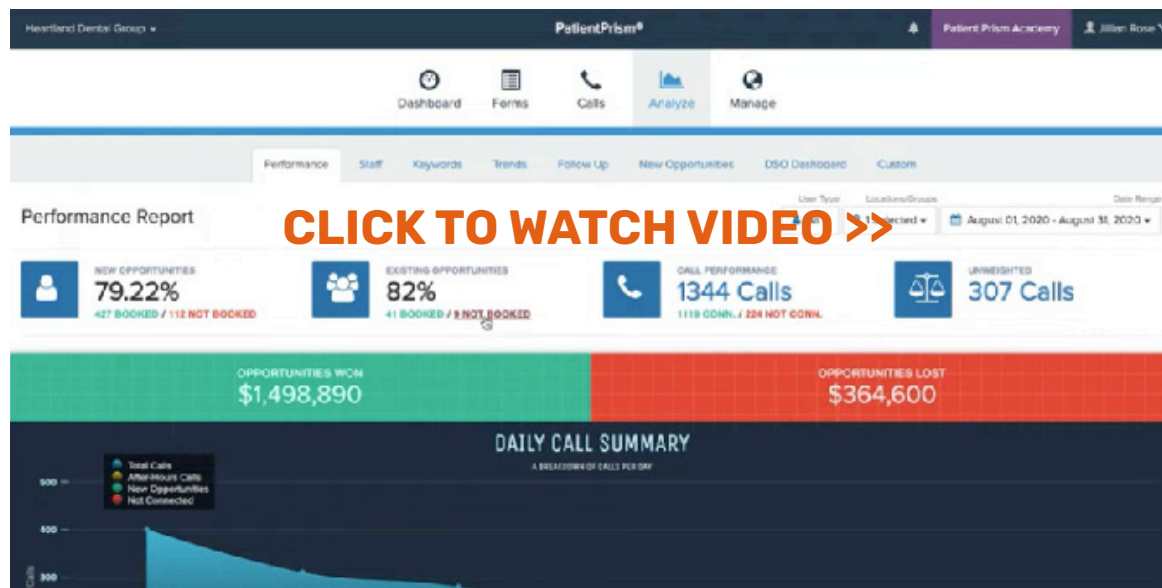
PERFORMANCE REPORT (cont.)

Patient Prism's Performance Report provides the following information:

1. **New Opportunity Conversion Rate**

2. **Existing Opportunity Conversion Rate**

3. **Call Performance** - The total number of calls that have entered the Patient Prism system and the number of calls that connected to a live team member (Connected vs. Not Connected Rate).

4. **Unweighted Calls** - Calls are unweighted when the patient is not a viable lead. Unweighted calls do not factor into conversion rates.

   • For example, when a caller has Medicaid and the office is unable to accept Medicaid Insurance.
   • For example, When a caller asks for a procedure and service not offered at the office.

5. **The Estimate of Revenue** - A breakdown of opportunities won and opportunities lost.

   These estimates are generated by the spoken words of the caller. Patient Prism ties the spoken words of the caller to each phone call to see the potential amount of revenue that caller could generate for your practice.

   • For example, if a patient states that they need a cleaning and an extraction, Patient Prism ties the associated fees for a cleaning and extraction to that phone call.

- Please note that a generalized fee schedule was given to Patient Prism by your office.

6. **Daily Call Summary** - A breakdown of calls per day. Provides visibility into your peak call volume days, how many new patients are calling your office each day, how many calls are connected to a live person each day, and how many callers contact your practice after hours.

7. **Hourly Call Summary** - A breakdown of calls per hour. Provides visibility into your peak call volume times, how many new patients are calling your office each hour, how many calls are connected to a live person each hour, and how many callers contact your practice after hours.

8. **Reasons Not Booked** - A breakdown of why new patients did not schedule an appointment.

9. **Reasons Not Connected** - A breakdown of why calls were not connected to a live person.

10. **Enterprise Insights** - Provides Regional Managers the option to view multiple locations at once.

   Data points include new opportunity conversions, existing opportunity conversions, connection rates, reasons not connected, and reasons not booked.

STAFF REPORT

Easy steps to access the Staff Report:

1. Select the "Analyze" module.
2. Select the "Reports" module.
3. Select the "Staff" module.
4. Select your location.
5. Select your date range in the upper right corner.

Please note that the date range will automatically populate to the last 48 hours. The date range can be modified by clicking on the dates and selecting a preset date range, or by entering a custom date range.

CLICK TO WATCH VIDEO >>

STAFF REPORT (cont.)

Patient Prism's Staff Report provides the following information:

1. **New Opportunity Conversion Rate**

2. **Existing Opportunity Conversion Rate**

3. **Connected vs. Not Connected Rate**

4. **Unweighted Calls** - Calls are unweighted when the patient is not a viable lead. Unweighted calls do not factor into conversion rates.

   • For example, when a caller has Medicaid and the office is unable to accept Medicaid Insurance.
   • For example, when a caller asks for a procedure and service not offered at the office.

5. **Booking Summary in Graphical Form** - An overview of staff booking performance.

6. **Staff Metrics Table**

   • Number of new patients each team member speaks with and how many new patients are converted by each team member
   • Number of existing patients each team member speaks with and how many existing patients are converted by each team member
   • Average score per team member based on the percentage of time that Patient Prism Call Basics are covered during new patient phone calls
   • CallViz feedback generated by Patient Prism's opportunity agents
   • Estimate of Opportunity Won vs. Lost Revenue by team

member.

7. **Patient Prism's Silver Gold and Diamond Award winners can also be found along the left hand side of the Staff Metrics Table.**

   Team members can qualify for awards based on their new patient conversion. Each team member must have at least 5 new patient calls in Patient Prism's system, and the following new patient conversion rates in order to qualify.
   - Diamond Club: 85% - 100%
   - Gold Club: 75% - 84%
   - Silver Club: 65% - 74%

   Click the icon next to each team member's name to generate and print a Certificate of Excellence.

8. **Call Phase Performance -** The percentage of time that Patient Prism's recommended Call Basics are covered by the team as a whole.

   Call Basics are a set of criteria we encourage you to discuss during the new patient phone call to help build rapport with the patient and help them feel comfortable scheduling an appointment with your office.

9. **Call Basic Explorer -** The percentage of time that Patient Prism's recommended Call Basics are covered by each team member.

   Click on the names of your team members to see how often each recommended Call Basic is being covered during new patient phone calls.

TRENDS REPORT

Easy steps to access the Trends Report:

1. Select the "Analyze" module.
2. Select the "Reports" module.
3. Select the "Staff" module.
4. Select your location.
5. Select your date range in the upper right corner.

Please note that the date range will automatically populate to the last 48 hours. The date range can be modified by clicking on the dates and selecting a preset date range, or by entering a custom date range. **We recommend selecting at least three months of data when using the Trends Report.**

CLICK TO WATCH VIDEO >>

TRENDS REPORT (cont.)

Patient Prism's Staff Report provides the following information:

1. **New Opportunity Conversion Rate**

2. **Existing Opportunity Conversion Rate**

3. **Connected vs. Not Connected Rate**

4. **Unweighted Calls**
   Calls are unweighted when the patient is not a viable lead. Unweighted calls do not factor into conversion rates.

   • For example, when a caller has Medicaid and the office is unable to accept Medicaid Insurance.
   • For example, when a caller asks for a procedure and service not offered at the office.

5. **Month over Month Performance**
   The Trends Report will provide visibility into month over month performance on a number of statistics including:

   Conversion rates for both new and existing patients
   • Toggle the columns depending on if you'd like to view new patient or existing patient conversion rates.

   The reasons why new patients did not schedule
   • Toggle the columns depending on the reason why new patients did not schedule an appointment.

   The estimate of revenue "won" for each month

   The amount of not connected calls for each month

The reasons why callers were not able to connect to a live team member
• Toggle the columns depending on why the patient was unable to connect.
• Please note that RMOs will have the ability to select as many locations as they have on the Patient Prism platform, and PMOs will have the ability to access their location. All information can be exported.

6. **Graphical Overview**
   Existing patient data
   New patient data
   Average call scores
   Revenue trends

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