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AT OUR CORE**

New Mexico's Physicians

NMMS

**NEW MEXICO MEDICAL SOCIETY
2025 ANNUAL CONFERENCE**

Saturday, September 27, 2025

Sandia Resort and Casino

Risk Management

Presented by



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Austin, TX



It's the Little Things: Enhancing Patient Relationships and Reducing Risks

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Objectives

Upon completion of this session, participants will:

1. Define hospitality and customer service in an office practice and explain its importance.
2. Identify consequences of poor customer service in an office practice.
3. Incorporate practical steps to improve patient interactions and patient satisfaction in their workflow.

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“It’s the little details that are vital. Little things make big things happen.”

John Wooden
Winner of 10 National Championships
as UCLA Basketball Coach

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DELIVERING HOSPITALITY

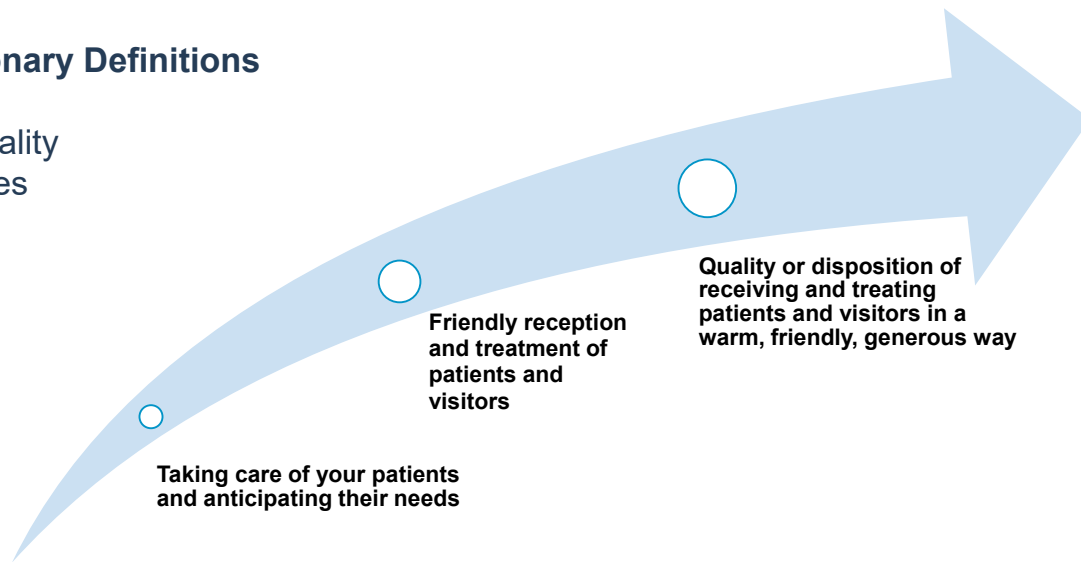


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What is Hospitality?

Dictionary Definitions

hospitality
pl. -ties



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Why Does Hospitality Matter?



- Demonstrates that you care
- Puts the patient at ease
- Enhances trust with patients and family members
- Lessens chance of disruptive patient behaviors
- Contributes both to patient and provider satisfaction

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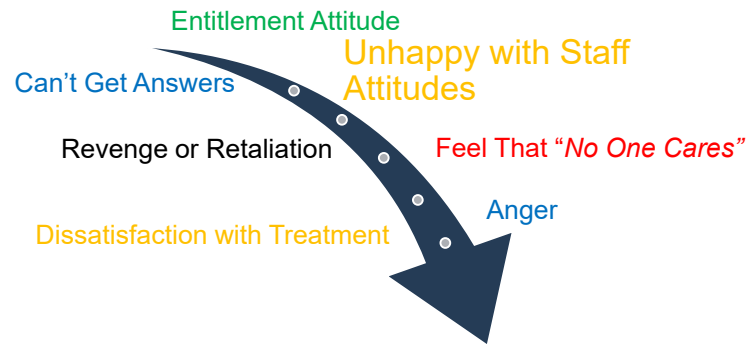
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Another Known Benefit...

It reduces the reasons why patients file lawsuits...



Your relationship and communication with a patient is a factor in all these reasons!

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Reduces Medical Board Complaints

These types of complaints are behavioral in nature

Unprofessional conduct

Failure to communicate aspects of care

Inappropriate touch, sexual misconduct

Failure to provide informed consent

Disrespectful behavior or treatment by office staff

Emotional trauma of patient

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FIRST IMPRESSIONS MATTER

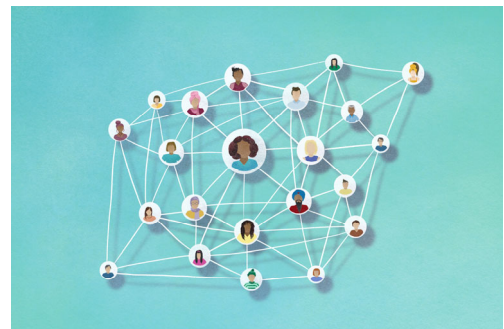


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Making a Good First Impression

Where do perceptions about your practice start?

- Practice website
- Word of Mouth
- Online Community Discussion Forums
- Social Media
 - Yelp, Healthgrades, Vitals, RateMD, Google Reviews
 - Instagram, Youtube, Tiktok



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How You Promote Your Practice Matters

- **DO NOT** exaggerate your experience.
- Create accurate patient expectations.
- Watch your words:
 - “State of the art”
 - “Latest technological advances”
- Follow state advertising laws for physician/dental practices, medical/dental board rules, and other state regulations.
- Control the content and routinely monitor posts on networking sites.

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Managing Social Media Matters

- **Monitor the sites:**
 - Assign the task to check rating sites and “Google” your name/practice’s name weekly or set up a free Google Alert
- **Manage the sites:**
 - Encourage positive feedback from satisfied patients but avoid cherry picking or pressuring patients for good ratings
 - Review comments to see if participants dispute one another
 - React appropriately to negative feedback

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When a Negative Posting Occurs...



- Listen to the criticism.
- Respond if appropriate with a generic, standard statement, such as:
 - “Thank you for your feedback, but due to HIPAA and state privacy laws, we cannot comment directly to the online post. However, we always encourage patients to contact the office directly to discuss any concerns.”
- Avoid the courts. Remember what you write could be used against you.
- Act as professional in the virtual world as when you see a patient in person.

Cahill R. Dealing With Online Patient Complaints. Thedoctors.com. Published May 2023.
<https://www.thedoctors.com/articles/dealing-with-online-patient-complaints/>

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NEW PATIENTS



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Commitments

- **Establish a statement of commitment for the new patient:**
 - Physician responsibilities
 - Patient responsibilities to communicate relevant information
 - How to address questions related to patient care, billing, HIPAA, etc.
 - How to reach physician after clinic hours
 - What to do when the physician/dentist is not available, including what to do in an emergency
 - Basic office policies: Prescription refills, patient decorum, financial policies, patient compliance

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Know Your Patient

- **Query for a thorough social history:**
 - Ask about hobbies, family, and other interests
 - Identify their career status or occupation
 - Assess literacy and health literacy competency by asking questions, such as:
 - What is their primary language
 - Are they able to read and write in English
 - What is their level of education
 - Are there cultural and/or religious considerations that may impact how they interact or comply with their care

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Educate and Inform Each Patient

- **Provide thorough informed consent to the patient's satisfaction**
 - Engage the patient in the discussion
 - Informed consent is a process; not a one-time discussion
- **Educate your patient regarding health processes**
 - Most practices do educate patients but fail to document the discussion
- **Informed consent is the responsibility of the physician and is non-delegable**



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Phone Conversations Matter

Eliminate routine practices that lead to this impression:

“We’re too busy to care for you.”

- **Manage incoming calls:**
 - a) Speak slowly, deliberately, clearly (for elderly or hard of hearing pts)
 - b) Answer calls within three – four rings, if possible
 - c) Ask permission before putting caller on hold
 - d) Avoid forwarding to an answering machine during business hours: “Please leave a message and we’ll get back with you...” is not reassuring to sick patients or patients in pain.
- **Create a generalized script for employees**

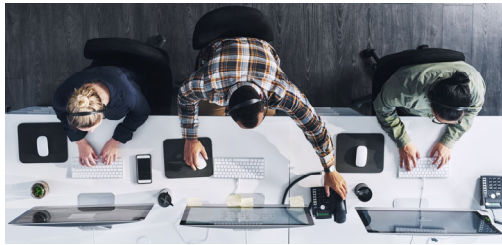
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Phone Conversations Matter

- Make sure calls are HIPAA secure (know who is within hearing distance)
- Avoid letting patients “fall through the cracks”
- Role-play difficult calls
- Monitor using “ghost” callers
- Always document calls (Use designated areas in the EMR system)



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Recorded Messages Matter



- **When using automated recordings to answer incoming calls, include an emergency message:**
 - Get to the point—keep it concise
 - Begin with “If you are experiencing an emergency, please hang up and call 911”
 - Put hospitals and doctors' offices as first choice, not option # 9
 - Speak clearly and use friendly voice
 - Consider language options based on the needs of your patient population

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The Receptionist Matters

- Acknowledge patients immediately and greet by name if possible.
- Be neat and wear professional attire.
- Avoid eating or drinking in front of patients. Keep food and drinks out of sight.
- Cardinal rule—watch conversations:
 - Avoid discussing personal business when it can be overheard
 - Monitor what a patient can see and hear when a receptionist is required to communicate PHI on the phone or in-person or with other staff
- Check that PHI paperwork is not visible to other patients, and visitors or vendors

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The Waiting Area Matters

- Assign someone the task of managing hospitality in the waiting room areas.
- Provide a comfortable and inviting space.
- Keep patients informed regarding wait times.
- **Remember:** When patients are informed and comfortable, they are less likely to become angry.



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Waiting Area Safety Matters Too

Furnishings

Sight lines

Safe flooring

Lighting

Maintenance

Infection control

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Safety for Kids Matters

- **If children accompany your adult patients, consider taking these steps in your office waiting area:**
 - Cover electrical outlets
 - Provide toys and reading materials that are age appropriate for your patients/visitors:
 - Clean toys and books on a regular schedule to minimize infection control problems
 - Check toys before purchasing and on a regular schedule to ensure safety (e.g., broken parts, rough edges)
- **Avoid TV and radio channels and posted materials that are inappropriate for children.**

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Restrooms Matter



- **Think about the restroom(s) in your office that are used by patients. Can any of the following be improved?**
 - Antiseptic hand cleaner is available at each sink
 - Locks work on all doors and/or stalls
 - There is a place to hang one's purse and coat
 - Plumbing is fully functional and sanitary
 - Floors are clean including visible areas that are hard-to-reach

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Restrooms Matter

- Trash is stored in closed containers and is not overflowing
- Paper towels or air dryers are located near sinks to prevent wet floors
- Supplies are restocked regularly
- If applicable, the restroom set up makes it easy for a patient to collect a urine sample
- The wastebasket is near the door for paper towel discards
- Handicapped patients are accommodated
- Emergency button, if appropriate

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PATIENT INTERACTIONS



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Make It Personal

- **Assigning the same staff to work with the same physician produces benefits, such as:**
 - Continuity of Care
 - Staff who know patients are more perceptive about changes in their health condition or lifestyle, as well as their attitudes, and/or satisfaction with the care they receive
 - Familiarity helps patients to “bond” with staff
 - It may improve office moral, and therefore, reduce staff turnover



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The Receptionist Matters

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Professional Designations Matter

- **Use designated titles appropriately:**
 - **Wear nametags**
 - Consider badges with bold tags indicating: RN, MD, etc. This helps patients identify professional licensure and roles within your practice
 - **Avoid calling medical assistants “nurse,” Use “nurse” only for a licensed nurse; doing otherwise is illegal**
 - Politely correct patients if they call a physician assistant or nurse practitioner “doctor”
 - Remember: Intentional misrepresentation of credentials is illegal and can result in claim, a report to the professional licensing board, and/or criminal prosecution

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Engaging the Patient Matters



- **Recognize the barriers that may interfere with physician-patient communication:**
 - Anxiety
 - Illness/pain/fatigue
 - Confusion or irritation from too many questions or instructions
 - Cultural differences
 - Financial concerns (Can they pay for drugs, treatment?)
 - Language or hearing challenges
 - Literacy and health literacy (know the difference)

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Additional Considerations

- Watch body positioning/body language: Best to be at eye level when possible.
- Listen! Give patient time to tell you what's wrong without interrupting.
- Respect patient privacy-conversations.
 - Should always be in private and not in common areas such as hallways, waiting rooms, and appointment desks



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Other Interactions That Matter



- Smiling when appropriate.
- Use chaperones when appropriate.
- Give clear instructions, preferably in writing, and use teach-back method.

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BEYOND THE WAITING ROOM



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Escort Patients Purposefully

- **Practice these interactions when escorting a patient to/from an exam or treatment room:**
 - Introduce yourself and greet each patient by name; ask a new patient how they prefer to be addressed and document this in the medical record
 - Stay with the patient and match your walking and talking to the patient's pace
 - Avoid leaving the patient behind
 - Be cognizant if your practice type is sensitive (plastic surgery, pain management, etc.) or is HIPAA “super protected”—mental health, substance abuse, etc. Maintain privacy at all times.

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Exam/Treatment Rooms Matter



- **Monitor rooms to ensure they are:**
 - Comfortable and attractive
 - Clean and safe: Leave no trace of the last patient's visit!
 - Informative (relevant charts, patient educational material, current magazines)
 - Use this time to learn more about your patients

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Tips for Long Waits

Keep patient
informed of time
issues

Offer to sit in a
chair or recline

Secure their safety
if physically
unstable

Check frequently
on their well-being

Offer water or diet-
appropriate
refreshment

Provide current
reading material or
offer wifi

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Cleanliness Counts

- Promote hand hygiene and cleanse your hands in front of patients
- Disinfect exam and procedure rooms according to OSHA requirements
- Live dust-free! Check equipment, non-clinical items, corners (floor and ceiling) and other spaces where dust bunnies and cobwebs gather
- Employ professional cleaning services as frequently as needed to maintain a clean environment
- Keep biomedical waste contained or covered



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Patient Communication Matters



- Practice “Universal Precautions” for health literacy with every single patient
- Avoid the use of medical jargon
- Remember patients only take away **10%** of what was shared with them in exam room (Yikes!)
- Have patients “repeat back” to you any education/instructions you have provided
- Provide written instructions using simple terminology

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Patient Check-out Matters

- The “Check-out” person should be warm and friendly
- Conduct financial discussions privately
- Double check prescriptions, orders, instruction sheets, appointments
- Say goodbye with hospitality (rehearse with staff, as needed)
 - *“I hope you feel better, Adam. Let us know if you have any questions about your medications. We’re here for you if you need us.”*
 - *“Jane, Thank you for coming to see Dr. Jones. We appreciate the opportunity to provide you with medical care, and we’re so glad you’re our patient.”*
- Consider other recognitions such as:
 - Special occasions, birthdays

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PATIENT SATISFACTION



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Patient Perceptions About Quality Matters

- Was good rapport established (physician/staff)?
- Did I get what I expected?
- Did I get better?
- Did they care about me?
- Was I treated with respect?



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Patient Feedback Matters

- Use patient satisfaction surveys to evaluate services.
- Have a patient relations program to receive feedback and address issues.

Patient Satisfaction Survey

Your satisfaction is important to us. Your answers will help us find the best ways to meet your needs and provide you with quality patient care and service.

1. Please rate your level of satisfaction regarding the topics listed below:

	Satisfaction					
	1	2	3	4	5	NOA
How would you rate your overall satisfaction with your visit?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length of time you waited to get an appointment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Courtesy of the person who answers the phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Readiness of the person at the front desk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length of time you waited in the reception area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Courtesy of the person who took you to the exam room	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length of time the health care provider spent with you Circle one: Physician, Physician Assistant, Nurse Practitioner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Explanation of the treatment plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Length of time available to answer all of your questions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Explanation of the purpose of the prescribed medications, therapies, and any side effects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Please rate your level of understanding of the topics below:

	Understanding					
	1	2	3	4	5	NOA
Your main medical problem	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What you need to do about your problem	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Why you need to follow instructions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How to contact our office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Please tell us how we could improve our service:

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“Your most unhappy customers are your greatest source of learning.”

Bill Gates

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Manage Grievances Promptly

- **Resolve grievances promptly to avoid a larger problem.**
 - Address a complaint directly; avoid ignoring or shying away from a complaining patient, parent or guardian.
 - Allow the person to vent their opinions or frustrations, listen attentively, and show empathy and/or understanding.
 - Answer by addressing the concern or commit to responding within a specific timeframe.
 - Follow through with an answer or resolution on or before the time committed or contact the person with a status update and a new timeframe for an answer or resolution.

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Manage Grievances Promptly



- **Try to make things right when a complaint has merit, such as:**
 - Dismiss a bill, provide a full or partial refund, or negotiate a settlement
 - Contact a department, insurer, or agency to clarify the situation and/or resolve the grievance
 - For minor situations, consider a nominal gift card

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Handle Challenging Situations

- **Recognize that most patients who complain or are demanding want to:**
 - Be taken seriously
 - Be listened to and heard
 - Have the problem acknowledged
 - Have someone to take accountability
 - Be reassured that the problem will not recur

Apologies matter: “I’m sorry you are going through this...it must be very frustrating for you. Let’s see what we can do to help.”

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Handle Challenging Situations

- **When a patient or family members is confrontational, the priority is to defuse their anger with these steps:**
 - Manage your communication and response
 - Separate the hostile person from others
 - Take action to immediately address the cause of the complaint
 - Clarify expectations and any financial obligations for the patient
 - Alert the patient’s physician or dentist to the situation if they are not involved or didn’t observe it
 - Have a witness/exit plan



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Disclose Adverse Events Properly

- **Appropriate management depends on the situation**
 - Medical or system error
 - Known risk or complication
 - Unexpected event
 - Unexplained change in patient status or new diagnosis of late-stage disease

Contact Patient Safety Hotline for guidance: (800) 421-2368

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Our Mission is to Advance, Protect, and
Reward the Practice of Good Medicine.

We're Taking the Mal Out of Malpractice.

Thank you!

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