

Communicating and Reinforcing Patient Policies and Procedures in Healthcare Practices

Developing comprehensive policies and procedures that address various aspects and functions within a healthcare practice is a vital component of sound practice management. Without these expectations and standards in place, things can quickly go off the rails, causing outcomes that may range from minor annoyances to serious harm.

Although having policies and procedures is essential, they will do no good if the practice does not enforce them. Most patients will likely see the benefits or understand the reasoning of the policies that are pertinent to them. However, healthcare providers and staff also may encounter some patients who disregard

the practice's rules or standards for any number of reasons. When this occurs, it might be tempting to ignore the behavior, make exceptions, or implement workarounds. However, doing so can have serious downstream consequences.

Thus, clearly communicating and consistently following organizational policies and procedures is crucial for successful operation of the practice and the provision of high-quality care. The following tips can help practice administrators, providers, and staff members work with patients to establish expectations and set the stage for productive and positive experiences in the practice environment.

1

Develop concise, straightforward written guidance on the practice's policies and procedures that are applicable to patients, and include this guidance in your patient handbook. Clearly explain each policy and its rationale as well as what patients can expect during visits to the practice.

2

Make sure all providers and staff members are aware of the organization's policies and procedures, and clearly and promptly communicate any changes as they occur to ensure consistency in how various tasks and scenarios are handled.

3

Post written policies on the practice's website and communicate them via social media, email, and portal messaging. Make sure patients are aware of policies during appointment scheduling to avoid confusion when they arrive and to provide an opportunity for them to clarify any information as needed.

4

Make sure that patients are aware that following the practice's policies is a requirement for their appointments. Patients who do not want to adhere will need to reschedule for another time when they are willing to follow the practice's policies or find alternative care options. (Note: Patients who need acute care will require a different approach, and practice administrators and providers should work together to determine a policy for handling these situations.)

5

Consider using [patient agreements](#) as a tool to improve patient adherence to the practice's policies and procedures and/or to address any negative behaviors that stem from a patient's unwillingness to follow policies.

6

Designate a staff member to work directly with patients who have concerns about office policies and procedures. The designated individual should listen carefully and empathetically to patients' issues and determine whether the practice needs to make any accommodations or whether policies require review and revision.

7

If patients disregard policies and procedures while at your facility, remind them of the organization's expectations as well as the efforts that were made to communicate about policies and procedures in advance. Don't engage in arguments or debates with patients about the validity of organizational policies and procedures. Simply explain the practice's expectations and reinforce that they are not negotiable.

8

Consider designating certain individuals within the practice to communicate with patients who resist policies or become argumentative. Having a chain of command for escalating situations might be helpful, particularly for staff members who may feel uncomfortable or unprepared to deal with difficult behavior.

9

Have a plan in place for dealing with patients who become angry, threatening, or violent. Train staff on [de-escalation techniques](#) and security protocols. The safety and well-being of patients and staff members should be the utmost priority, and practices should establish verbal and physical triggers that initiate a call to security or law enforcement.

10

Consider role-playing exercises as part of preparing providers and staff members for dealing with patients who are not receptive to the practice's policies. This type of training can help individuals become more comfortable and ready to manage these situations.

11

Periodically review your organization's policies and procedures to determine whether (a) they reflect current practice, (b) gaps exist, or (c) adjustments should be made.

Resources

For more information about communicating with patients, see the following MedPro resources:

- [*Collaborating With Healthcare Staff to Improve Patient Safety, Adherence, and Satisfaction*](#)
- [*Developing Effective Telephone Triage Protocols in Healthcare Practices*](#)
- [*Guideline: Communicating Effectively With Patients to Improve Quality and Safety*](#)
- [*Improving Complaint Management in Dental Practices*](#)
- [*LEAPing to Better Complaint Management in Healthcare Practices*](#)
- [*Thirteen Strategies for Improving Communication and Patient Care in Dentistry*](#)

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