RevRx AI Consulting

PATIENT ACCESS GUIDE

Patient Journey Friction Removal Guide

Every extra step between “I’m interested” and “I’m here” costs you patients.

For practice owners and managers who want more inquiries to turn into kept visits.



Where Patients Slip Away

Patients rarely say no. They just stop. A slow reply, a long form, or a confusing text is enough. Here is where it happens.

1 **Inquiry**

THEY WANT a fast answer.
FRICTION no reply after hours, or a voicemail box.
FIX **reply right away with a booking link and a call-back time.**

2 **Booking**

THEY WANT to book in a few taps.
FRICTION phone-only booking, long forms, too few time slots shown.
FIX **online booking on mobile, with a call-back option.**

3 **Confirmation**

THEY WANT to know it's set.
FRICTION no confirmation, or one that leaves out the address or what to bring.
FIX **a confirmation with date, time, address, parking, and what to expect.**

4 **Intake**

THEY WANT to finish forms on their phone.
FRICTION paper forms, PDFs that need printing, repeat questions.
FIX **short mobile forms, sent once.**

5 **Reminders**

THEY WANT a simple nudge and an easy way to reschedule.
FRICTION no reminder, or a reminder with no way to reply.
FIX **reminders that let them confirm or reschedule by reply.**

6 **Visit**

THEY WANT a smooth first visit and a clear next step.
FRICTION waiting while forms get finished, no follow-up after.
FIX **forms done before arrival, and follow-up the same day.**

COPY THIS PROMPT INTO YOUR AI TOOL. FILL IN THE BRACKETS.

Act as a patient access operations advisor. For a **[practice type]** that offers **[services]**, outline the ideal new-patient experience from first inquiry to first visit. For each stage, list where patients are likely to drop off and one fix. Include accessibility needs, such as mobile use, plain language, and other languages. Use no patient-identifying data.

Be Your Own New Patient

Grab your phone. Go through your own practice the way a new patient would. Write down what you find.

1	Search your practice name and service on your phone. Can you find the booking page from the results?	**Found it** ☐ Yes ☐ No
2	Try to book a new-patient visit without calling.	**Number of taps to book** _____
3	Send an inquiry through your website form or by text after hours.	**Time to first reply** _____
4	Call during lunch hour.	**Answered by a person** ☐ Yes ☐ No
5	Read your confirmation message.	**Has date, time, address, parking, and what to bring** ☐ Yes ☐ No
6	Open your intake forms on your phone.	**Can finish without zooming or printing** ☐ Yes ☐ No
7	Read your reminder.	**Can confirm or reschedule by reply** ☐ Yes ☐ No

Every "No" is a place a patient can slip away. Fix those first.

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Here are the results of my phone test on my own practice: **[paste your answers]**. Rank the problems by how likely they are to lose a new patient, and give one practical fix for each. Do not assume tools or software I did not mention. Ask me if you need more detail.

Make Booking the Easy Part

FRICTION	FIX
Phone-only booking	Online booking on mobile, plus a call-back option
Long booking form	Ask only for name, phone, email, reason for visit, and preferred time
No reply after hours	An instant reply with a booking link, and a call back the next business morning
Few time slots shown	Show all open new-patient times, including early and late slots if you offer them
A confirmation that leaves things out	A confirmation with date, time, address, parking, what to bring, and how to reschedule

Every confirmation should include

- [ ] Date and time
- [ ] Practice name and address
- [ ] Parking or entry details
- [ ] What to bring
- [ ] What to expect at the first visit
- [ ] How to reschedule

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Review my booking process for **[practice type]**: **[describe how patients book today, including steps, form fields, and hours]**. List every step that adds friction, and suggest a simpler version. Then write a confirmation message that includes date, time, address, parking, what to bring, and how to reschedule. Keep it under 300 characters for text.

Reminders That Get Replies

At booking
Confirmation

Two days before
Reminder with confirm or reschedule

Day before
Reminder, plus a forms nudge if the forms aren't done

Morning of
Short reminder with directions (optional)

Text the right way

- Get the patient's consent before you send texts.
- Stop texting right away when someone opts out.
- Check the rules for your state with your counsel.
- Say who is texting and how to opt out.
- Keep texts free of treatment details.

CONFIRMATION

Hi **[First name]**, you're booked with **[Practice]** on **[Date]** at **[Time]**. Address: **[Address]**. Parking: **[Details]**. Reply R to reschedule. Reply STOP to opt out.

TWO-DAY REMINDER

Hi **[First name]**, see you on **[Date]** at **[Time]** at **[Practice]**. Reply C to confirm or R to reschedule. Your forms are here if you haven't finished them: **[Link]**

RESCHEDULE

No problem, **[First name]**. Here are a few open times: **[Time 1]**, **[Time 2]**, **[Time 3]**. Reply with the one that works, or book here: **[Link]**

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Write a reminder message set for new patients at a **[practice type]**: a confirmation, a two-day reminder, a day-before reminder, and a reschedule reply. Keep each text under 300 characters. Include how to confirm, reschedule, and opt out. Leave out treatment details. Use a warm, plain tone.

Forms Done Before They Walk In

Keep intake short

DO

- Send forms once, right after booking
- Make them work on a phone
- Ask each question only once
- Save progress so patients can finish later

DON'T

- Send PDFs that need printing
- Ask for information you already have
- Wait until the day before to send forms

What every new patient should know before arrival

- [ ] Address, parking, and entry
- [ ] What time to arrive
- [ ] What to bring
- [ ] What happens at the first visit
- [ ] How payment works
- [ ] How to reach you with questions

When forms are done before the visit, the first visit starts on time.

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Review my new-patient intake forms for [practice type]: [paste the list of questions or sections]. Point out repeat questions, questions we could ask later, and anything hard to finish on a phone. Suggest a shorter version. Do not remove anything our clinical team needs for safety; flag those items for their review instead.

Automation Starts It. People Finish It.

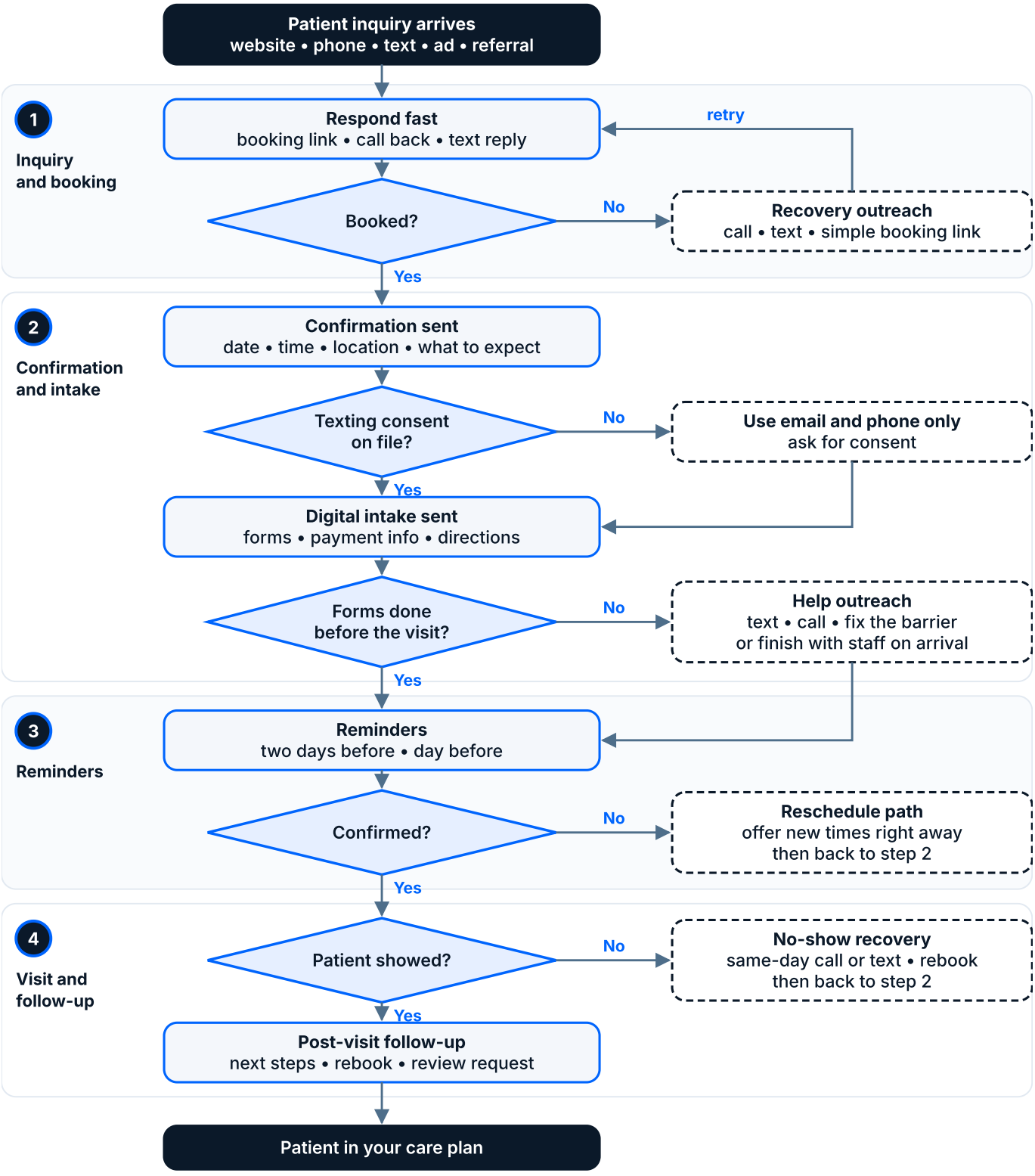
Most drop-offs happen in the gap between an automated message and the person who should follow up. Name an owner for every handoff.

MOMENT	AUTOMATION DOES	STAFF DOES	OWNER
New inquiry	Sends an instant reply with a booking link	Calls back if not booked	
Booking made	Sends the confirmation and intake forms	Checks that the details are right	
No texting consent	Uses email only	Asks for consent at the next contact	
Forms not done	Sends a nudge	Calls to help or finishes them on arrival	
No reply to reminder	Sends a second reminder	Calls to confirm	
Cancellation	Offers new times	Fills the open slot	
No-show	Sends a same-day message	Calls to rebook	
After the visit	Sends next steps and a review request	Books the next visit	

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Develop a vendor-neutral new-patient intake and appointment reminder workflow for **[practice type]**. Show the automation triggers, where a staff member must step in, how consent is checked, and the rescheduling and no-show paths. For each handoff, name the role that should own it. Do not assume a specific software tool.

The Full Patient Journey Workflow



Solid boxes are automated or routine steps. Dashed boxes are where a person steps in.

08 | NEXT STEP

Find Where Patients Slip Away

RevRx AI helps practices turn more inquiries into booked, kept visits.

STEP 1

Take the MedSpa Revenue Leak Scorecard

Answer 10 questions and see where your practice is losing patients.

Take the Scorecard

https://www.revrxai.com/consumer-health-tools

STEP 2

Book a Discovery Call

A 30-minute call to walk through your patient journey and where it leaks.

Book a Discovery Call

https://api.revrxai.com/widget/bookings/30-minute-meeting-with-terryrovrku

RevRx AI Consulting

Terry Coutsolioutsos
Founder and Revenue Architect
linkedin.com/in/terry-coutsolioutsos/
revrxai.com | 941-400-1352