# Pre-registration metrics worksheet

*This metrics worksheet will help you evaluate your current registration process and then measure improvements after the pre-registration process is in place.*

*Part 1 is a simple yes/no checklist to understand the overarching issues with your current registration process (before) and if these issues were resolved with implementation of the pre-registration process (after). Part 2 can be used for a more detailed analysis of the time and cost estimates for each task before and after implementation. The before data will form your baseline. You can compare before and after data using a run chart*.

**Part 1.**

| New appointment registration completed Before ⬜ No ⬜ Yes After ⬜ No ⬜ Yes |
| --- |
| New patient record updated Before ⬜ No ⬜ Yes After ⬜ No ⬜ Yes |
| Appointment confirmed 24 hours prior to visit Before ⬜ No ⬜ Yes After ⬜ No ⬜ Yes |
| Patient check-in on time Before ⬜ No ⬜ Yes After ⬜ No ⬜ Yes |
| MA/MD has time to review medical history Before ⬜ No ⬜ Yes After ⬜ No ⬜ Yes |
| Patient has enough time with the MD Before ⬜ No ⬜ Yes After ⬜ No ⬜ Yes |
| Patient leaves visit satisfied Before ⬜ No ⬜ Yes After ⬜ No ⬜ Yes |

**Part 2.**

|  |  |  |
| --- | --- | --- |
|  | Before pre-registration implementation | After pre-registration implementation |
|  | Time | Cost | Time | Cost |
| Completing new patient registration forms |  |  |  |  |
| Entering medical history and patient demographics into EHR  |  |  |  |  |
| Impact of late arrivals |  |  |  |  |
| Impact of no-shows |  |  |  |  |
| Backup in MA schedule due to late arrivals or no shows |  |  |  |  |
| Backup in MD schedule due to late arrivals or no shows |  |  |  |  |
| MA rooming of patient |  |  |  |  |
| Exam with MD |  |  |  |  |

*Source: AMA. Practice transformation series: advanced pre-registration. 2016.*