Date: \_\_\_\_\_\_\_\_\_

Location: \_\_\_\_\_\_\_

Time: \_\_\_\_\_\_\_\_\_\_

Sample patient experience assessment

*- Provided by Elizabeth Morrison*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **WAITING ROOM/FRONT OFFICE EXPERIENCE** | | | | |
| **Description** | **yes** | **no** | **comments** | |
| Is there any staff in the waiting room? |  |  |  | |
| Does the staff in the waiting room interact with patients, converse, offer water, etc.? |  |  |  | |
| Is the waiting room clean and neat? |  |  |  | |
| Do the walls have appropriate art and are they free from private patient information? |  |  |  | |
| Do the staff answering phones identify themselves to callers? |  |  |  | |
| Do the staff answering phones answer with a smile in their voice? |  |  |  | |
| Do the staff acknowledge patients within the first five seconds of walking into the building? |  |  |  | |
| Is there a neat children’s area/table with toys/coloring supplies? |  |  |  | |
| Does the staff keep patients informed about wait times? |  |  |  | |
|  | | | | |
| **Description** | **Smile** | **Greet** | **Eye Contact** | **comments** |
| Did staff acknowledge patients within the first five seconds with a smile, greeting and eye contact? |  |  |  |  |
| Patient 1 |  |  |  |  |
| Patient 2 |  |  |  |  |
| Patient 3 |  |  |  |  |
| Patient 4 |  |  |  |  |
| Did staff acknowledge patients waiting in line? If so, how? |  |  |  |  |
| Patient 1 |  |  |  |  |
| Patient 2 |  |  |  |  |
| Patient 3 |  |  |  |  |
| Patient 4 |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | | | | | |
| **BACK OFFICE** | | | | |  |
| **Description** | **Smile** | **Greet** | **Eye Contact** | | **comments** |
| Does the medical assistant (MA) come into the waiting room to get the patient? |  |  |  | |  |
| Patient 1 |  |  |  | |  |
| Patient 2 |  |  |  | |  |
| Patient 3 |  |  |  | |  |
| Patient 4 |  |  |  | |  |
| Does the MA introduce him/herself to patient? |  |  |  |  | |
| Patient 1 |  |  |  |  | |
| Patient 2 |  |  |  |  | |
| Patient 3 |  |  |  |  | |
| Patient 4 |  |  |  |  | |
| Does the MA walk side-by-side with patient? |  |  |  |  | |
| Were wandering patients approached and helped? |  |  |  |  | |
| **Description** | **Smile** | **Greet** | **Eye Contact** | **comments** | |
| Did MH smile, greet and make eye contact when calling patient? |  |  |  |  | |
| Patient 1 |  |  |  |  | |
| Patient 2 |  |  |  |  | |
| Patient 3 |  |  |  |  | |
| Patient 4 | | | |  | |
|  | | | | | |
| **GENERAL** | | | | | |
| Do staff walking by greet, smile and make eye contact with patients |  |  |  | | |
| Employee 1 |  |  |  | | |
| Employee 2 |  |  |  | | |
| Employee 3 |  |  |  | | |
| Employee 4 |  |  |  | | |