

Patient Access Audit Checklist

A quick audit of the front door to care | clearlynaveen.com

Digital front door

- ☐ Patients can find, book, and prepare online without a phone call
- ☐ The website answers the top access questions without a human
- ☐ After-hours requests are captured, not lost

Referral management

- ☐ Every inbound referral is tracked from receipt to scheduled visit
- ☐ Referral leakage is measured, not assumed
- ☐ Referring providers get status back automatically

Scheduling and no-shows

- ☐ Self-scheduling is available for the highest-volume visit types
- ☐ Reminders and easy rescheduling reduce no-shows
- ☐ No-show and cancellation rates are tracked by clinic and provider

Eligibility and coverage

- ☐ Insurance eligibility is checked before the visit, not at the desk
- ☐ Patients get a clear estimate of what they will owe
- ☐ Coverage issues are surfaced early enough to fix

Measurement

- ☐ Time to third-next-available is tracked as the access metric
- ☐ Access improvements tie to booked-and-kept visits, not vanity numbers

Access is a product problem. Fix the funnel, measure booked-and-kept visits, and the rest follows.