

# Modernizing the Urgent Care Patient Journey

## A Practical Checklist for Operators

Use this checklist to optimize each stage of the patient journey—from first search to final payment.

### 1. Discovery & Online Presence

- ☐ Google Business Profile is up to date (hours, services, insurance accepted)
- ☐ High-quality photos of your clinic and logo are added
- ☐ 4.0+ average rating on Google
- ☐ Consistent NAP (Name, Address, Phone) across all listings
- ☐ Booking link is visible and mobile-friendly

### 2. Online Booking Experience

- ☐ Booking form includes only essential fields (name, DOB, contact info)
- ☐ Form is single-screen or minimal steps
- ☐ Wait times are hidden or reframed as estimated appointment times
- ☐ Patients can choose between “next available” and specific time slots
- ☐ Online availability reflects real operational capacity
- ☐ Unused or throttled slots are reviewed regularly

### 3. Visit Access & Flexibility

- ☐ Telehealth option is offered during peak hours
- ☐ Clear visit types and entry points on website and booking form
- ☐ Staff trained to route patients to best-fit care option

### 4. Payment & Billing Experience

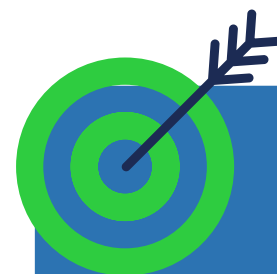
- ☐ Credit card on file (CCOF) workflow is implemented
- ☐ Staff trained on CCOF scripting and objection handling
- ☐ Digital receipts and balance notifications are available
- ☐ Collections are minimized through proactive payment workflows

### 5. Reviews & Reputation

- ☐ Automated review requests triggered after visit
- ☐ Staff ask satisfied patients to leave a Google review
- ☐ Negative reviews responded to professionally within 48 hours
- ☐ Review trends monitored monthly for service improvement

### 6. Operational Intelligence

- ☐ Click-to-book and click-to-visit rates tracked regularly
- ☐ Booking funnel reviewed for drop-off points
- ☐ Review feedback used for journey improvement
- ☐ Leadership reviews all patient journey metrics at least quarterly



#### Pro Tip

**Think like a brand.** Every touchpoint is a chance to build trust, reduce friction, and drive return visits.

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