APPOINTMENT CONTROL
SUCCESS IN APPOINTMENT BOOK CONTROL

- Economic production
- Stress on dentist, staff and patient
- The quality of care to your patients
- Ensures that your reception room is not a waiting room
IDEAL WORLD

• There is an efficient flow of patients in the practice
• Patient visits start and end on time
• No slack time
• Productivity is maximize
• Optimum dental team contribution
IDEAL WORLD

- Visits start/end on time
- Slack time eliminated
- No cancellations
- No no-show
- Productivity is optimized

Goal: Schedule appointments for optimum workflow
TIME
A PRECIOUS COMMODITY

• Your greatest enemy
• Your greatest ally
• Must be allotted for vacation, periodic breaks & continuing education
• In-office time must be used effectively
REALITY CHECK

- Most practices schedule haphazardly
- Good scheduling Techniques must be learned
  - Job roles
  - Patient needs
  - Procedures needs
  - Ops & resources
- Must continually re-evaluate
MAXIMIZE USE OF THE CALENDAR

• Days & hours open
• Number of ops & providers
• Duration of appointment
APPOINTMENT INEFFECTIVENESS

- Daily schedule is poorly planned
- Casual approach to scheduling
- No plan for productivity
- No understanding of appointment needs
- No control of patient care
- Poor delegation between doctor & team
UNWANTED EXCESS TIME

• This can come in two forms:
  🙁 Excessive time scheduled for a given procedure producing an unwanted gap between patients
  🙁 The “no shows” for appointment
• Scheduled gaps to allow for emergencies or simply a break are beneficial
Last minute cancellations & no-shows

• Reminding patients the day before their appointment will help to reduce cancellations & no-shows
RUNNING LATE?

- One of the greatest stress producing situations
- Can be a product of:
  - Overbooking
  - A procedure taking longer than expected
  - Emergencies
  - Telephone calls
  - A very talkative patient
RUNNING LATE?

• Never forget that your patient’s time is every bit as important to them as your time is to you
• Inform the patient as soon as possible and give them the choice of waiting or re-booking their appointment time
• If possible inform them yourself
WHO CONTROLS THE APPOINTMENT BOOK?

- Ultimately you are in control
- You delegate this control to your receptionist
- Other staff members should be trained to provide assistance when it is required
- The dentist should keep his/her hands off the appointment book
FEATURES OF PRODUCTIVE DAYS

- Clinical department fully appointed
- Hygiene department fully appointed
- No cancellations or broken appointments
- You do not fall behind or have to rush
- You can handle emergencies
- You and team are not stressed
- You feel a sense of accomplishment
SCHEDULE STRATEGY

• For flexibility it would be nice if appointment booking could be limited to two or three weeks in advance
• Not always possible in a busy practice unless you place patients on a waiting list
• Most patients, old or new want to know that they have an appointment time
SCHEDULE STRATEGY

- Booking four to six weeks out – time to begin to consider an associate for the practice
- Maximize chair and calendar time
- Receptionist’s job to schedule proper mix of new recall, emergency, operative and prosthetic patients, or any other area of dentistry that you enjoy
SCHEDULE STRATEGY

- Appointments involving lab work may be made in advance – allowing sufficient time for the return of the lab work
- Appointments requiring an item to be returned from the lab be indicated in the appointment book
- Booking a large block of time for long procedures and families
SCHEDULING STRATEGY

- Patients available for appointments on short notice
- No-shows and patients who cancel at the last moment
- All scheduling strategies should be included in the office manual and specific objectives included in the receptionist’s job description
THE APPOINTMENT BOOK
(If not computerized)

- Should lie flat, display an entire week & have enough columns to handle the # of operations
- The appointment column should contain the patient’s name telephone #, procedures to be performed & other coded notes about the patient or appointment
- Was the patient confirmed?
THE APPOINTMENT BOOK

• A vertical line through the operatory column to indicate the anticipated length of the appointment for that patient
• Clearly indicate all times not available for patient scheduling
• Make notations in pencil so they can be erased
THE APPOINTMENT BOOK

• Make sure that if a patient appears on the appointment book that he/she also appears on the day sheet to indicate that the patient was seen, even if no charge was levied

• Old appointment books and pages should be retained in record storage
OPERATORY FLOW SHEETS

- Copies of appointment book pages placed is strategic places throughout the office
- Allows the assistant to effectively and quietly pre-prepare and operatory for the next patient
- Allows the dentist to know how much time he has with his current patient & what procedures will be performed for the next patient
• Given to the patient when the appointment is made
• If the appointment was made by phone the cards should be mailed to the patients
• Be sure that the appointment has been made in the appointment book first
• Make sure that the date & time in the appointment book & on the card jive
APPPOINTMENT CONFIRMATION

- Make calls early in the day to provide ample time to fill vacancies
- Do not call elderly patients early
- Speak to the patient, spouse or in the case of children the parent directly, avoid leaving messages
- Use “confirm” rather than “remind”
APPOINTMENT CONFIRMATION

- Obtain the patient’s preferred contact number
- Enter any last minute cancellations or “no-shows” in the patient’s chart
- Every attempt must be made to encourage the patient to attend