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Practice Management Articles



Implementing a ‘Change in Schedule’ Policy

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Minimize No-Shows & Cancellations

It is time to change the way your patients view the urgency and importance of their dental appointments, especially hygiene appointments. Open time in the schedule, those blank white spaces that are a result of no-shows and cancellations, is one of the top sources of stress for the dental team.

“No-shows” are defined as “a patient who doesn’t show up and doesn’t call to cancel.” “Cancellations” are “patients who call to cancel on short notice, leaving it difficult to fill the void.”

So, how can we encourage our patients to happily show up on time for their appointments? There are three fundamental areas to address to keep non-productive time to a minimum.

1. Change the way your patients view the importance of oral health, especially hygiene appointments. They need to go from believing it’s “just a cleaning” to an understanding of how oral health is the “gateway” to overall body wellness.
2. Have a clear and concise financial policy with affordable and flexible options. Have patients commit to their payment choice in writing.
3. Refine and implement a “cancellation” policy with systems that reduce downtime in the restorative schedule to less than 5% and downtime in the hygiene department to less than 10%.

Let’s Start with the Diagnosis and Treatment Planning

During diagnosis and treatment planning, it’s important patients understand the urgency of care — and the consequences of delaying or declining treatment. After the patient has completed their examination appointment and the doctor has diagnosed the conditions and planned the case, the clinical presentation should answer all questions and reinforce how treatment will meet the patient’s overall healthcare goals.

Once the patient is comfortable and completely understands the treatment needed and benefits of care, the next conversation should be with the treatment coordinator for the financial discussion.

This is the best time to clearly communicate your practice's financial policy, including the patient's payment responsibilities and payment options. After the patient has chosen the option that best fits his or her financial situation, have them commit to a payment schedule in writing. Patients who have a written financial agreement are much more likely to show up and respect your time.

Why Your Patients Cancel or No-Show

Many dental teams believe if they charge a cancellation fee for missed appointments it will change their patient's behavior. However, this type of negative consequence is not a first defense. First, you need to understand your patient base and identify the true cause of downtime based on the team's input. Gather the team for a brainstorm session and discuss the following questions. From this discussion you should be able to agree on, and set up systems that work for your team and your patients. Answer these questions:

1. How widespread is your problem of no-shows and cancellations? (how many a week and month?)
2. What are three of the most common reasons/ excuses the patients use?
3. What is it the team says and does when patients no-show and cancel with short notice? Once you have a clear understanding of your patients' behavior and your team is doing an exceptional job communicating the value of dentistry and you have a financial policy, you can now develop a Cancellation (Change in Schedule) Policy that works specifically for your practice.

Your Change in Schedule Policy

The most effective Change in Schedule Policy is to ask patients for at least two business days notice to change their time reserved on the schedule. This way, patients won't abuse the weekends and you will have two business days to fill the voids. Make sure your patients are aware of your policy. It should be included in the financial policy, new patient kits, walk-out statements and any and all patient communication

documents. Remember, if you ask for two business days notice from patients to reschedule, your outgoing reminder calls must be made two days in advance of the patient's appointment.

Do NOT accept cancellations on an answering machine or through an answering service, if you use one while your office is closed. Instead, ask patients to call back during regular business hours. Be sure to document in the computer all no-shows and short notice cancellations, along with the reason for the cancellation.

Then, place your patients into three categories, assigning each patient an A, B or C depending on their appointment history and behavior. Make sure this "classification" is clearly visible. This system allows you to customize your communication and not reward chronic patients or punish patients who are cancelling for the first time.

"A" patients — always arrive on time, have high regard for preventive hygiene and give proper notice when an appointment time needs to be adjusted.

“B” patients — are generally good patients, are somewhat sporadic in their hygiene visits and have no more than two cancellations per year.

“C” patients — “Lucky if you see them,” generally come in for emergencies only and have a history of breaking appointments, especially no-shows.

For “A” patients, it is probably enough to confirm their appointment and skip the

courtesy reminder calls or give them a choice. If they do encounter valid difficulty in keeping the appointment, your team should do their best to immediately accommodate them by rescheduling them within the next few weeks or by putting them on a VIP list for last minute changes in schedule.

“Mrs. Jones, this is not like you as you always make your appointment. If tomorrow can’t work for you, we can try next week or put you on a list to accommodate you as soon as possible.”

“B” patients could go either way and can be influenced by how you set and help them keep their appointment. Let them know upfront that their past cancellations have impacted the practice and their oral health. Reinforce that in order to meet their needs, honoring their reserved time is important.

“Mrs. Jones, I see in your history that you’ve cancelled or missed in the past year and had some difficulty in the past keeping your scheduled time. Our team is committed to helping you get the care you need and it’s important to all of us, including Dr. Smith, that you keep your scheduled time. What can we do to support you in being here on Tuesday? Is there something we might be able to help you with?”

Effective Communication Techniques

The most de-valued appointment in dentistry is the hygiene visit. We have trained patients that it is “just a cleaning,” rather than an important part of their oral healthcare. Here are a few verbal tips that help patients re-think their commitment to hygiene and to recommended treatment.

Techniques to Use During Confirmation Calls:

- Transfer the ownership of the appointment to the patient by using this phrase, “I’m calling to confirm the time you reserved...”
- If the patient wants to cancel during the confirmation call, don’t be happy about it.
- Don’t let patients hang up without rescheduling an appointment. You don’t want to have to invest another 2–4 hours chasing them to reappoint their hygiene.
- Give patients an “Alternative Choice.” Provide options based on the best time for you while making the patient feel as if they are in charge. “Mrs. Jones, since you are unable to make your scheduled appointment, the alternative choice we have available is 3:00 p.m. on Monday or 10:40 a.m. on Wednesday.”

Techniques for Handling Cancellation Calls:

When the patient says, “I need to cancel my appointment today:”

- Place them briefly on hold and take a deep breath.

- Look up their history and classification.
- Return to the phone and let them explain their reason for breaking their scheduled time with the doctor.
- Actively listen and clarify the reason they have told you.
- Use verbal skills appropriate for their classification.

“A” patients — act concerned and mention this has never happened before.

“B” patients — tell them how many times this has happened and stress the importance of care and the problem this causes the practice.

“C” patients — tell them how many times this has happened before and let them know, instead of rescheduling them, you’ll put them on a short call notice list.

- Enter the cancelled appointment in the computer and note the reason the patient provided.

Top Take-Aways

1. Patients value and keep their appointments when they understand the benefits of treatment and how the treatment meets their needs or solves problems they own.
2. Patients keep their appointments when written financial arrangements are made in advance.
3. A Change in Schedule Policy is a process of encouraging patients to take ownership of their reserved time on the schedule and communicating how cancellations and no-shows impact the practice.
4. Understand your patients’ behavior and schedule them according to their propensity to fail appointments.
5. Never, ever communicate to a patient that it’s okay to fail an appointment.
6. Be considerate and understanding and realize there will be the occasional situation where a family emergency – such as a sudden death or injury – will keep someone from making their scheduled appointment.

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