

# Stop your OFFICE REVENUE LOSS



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## Some Patients SHOULD Not Be Booked!

Are you annoyed with how much money you are losing due to cancellations, missed appointments, and no shows. Are you tracking revenue loss from the busted productivity? It's probably best you don't know, because it will make your blood boil. Good news is that there is a predictable way to score higher probability in a patient showing up for an appointment if you DON'T book people that should not have been booked in your schedule. The fact is, that you should be very stingy with your appointments giveaway. It is better to be booked solid for the next 3 days then to be booked for 2 weeks with 30% of possible no shows. I know it makes you feel better if you have tons of patients in your book for the next month, but I guarantee your book is filled with tons of people that will blow you off. So what can you do?

Create an Appointment Pre-Booking Interview sheet. This sheet will have the patient's name, date of their appointment, and the team member's name that made the appointment. It will have a bunch of questions on it and they have to be filled out by the team member while they are asking the patient questions. You will need a folder with sections for 31 days of the month tabs. After the sheet is filled out, it will be placed in the day of the month that the appointment is scheduled. When that day comes, at the end of the day pull all the sheets in that day's folder and see if it matches your completed schedule. Any patients with the sheet should have been seen in your schedule. If they were not, that means they cancelled/no showed, missed etc. Calculate the percentage of showed patients out of total that should have showed. It should be as close to 100%. Anything lower than 90% is unacceptable. From there you need to track team members because it will come down to their communication skills and execution of the appointment pre-booking interview. Coaching the team member should follow. Also, take a look at treatment planning and treatment plan presentation.

How effective are you relaying the value of the treatment?

The goal of the sheet really is to force your team to take accountability for your appointment times by interviewing patients before they are scheduled. What you will find is that all of the sudden patients will value your time because you are selective who gets a piece of you. So only patients that have time, are not scared, have the money to proceed, and understand that they need the treatment will say YES YES YES YES and show up.

In the appointment pre-booking interview we are asking a series of questions that aid in a discovery session if the patient is ready to schedule and should be given an appointment today. There are 4 things we are looking at: 1. Value of treatment presented 2. Time availability 3. Fears of Dentistry 4. Financially ready to proceed

Appointment Pre-Booking Interview

Patient: \_\_\_\_\_ Date \_\_\_\_\_ Team member \_\_\_\_\_

Value:

1 Do you have any questions regarding treatment the Doctor diagnosed and reviewed with you today?

2 Do you have any concerns regarding this treatment?

Time:

1 Is there any time limitation that prevents you from proceeding with this treatment within next 2 weeks?

2 Does your work schedule allow for appointments at our office?

3 Is this the right time for you to proceed? Usually Doctor wants to see his/her patients within 2 weeks of diagnosis. Does that work with your schedule?

Fear:

3 We will make every effort to make your appointment comfortable. Is there any concerns that we can address or be prepared for your appointment? What you are looking for is fear. Most people are afraid of the Dentist and may need anti-anxiety medication prior to treatment or need to be assured that you will not hurt them, or they want to tell you that they don't want to see the needle etc. This is the time you will make a note of their fears, reassure them that you will do everything possible to attain their comfort, and, of course, relay the information to your Doctor so he/she is also on board and informed.

Financial:

4 Your treatment will cost \$\_\_\_\_\_ to get started with this procedure that Doctor diagnosed on you today. This amount will be collected on the day of treatment. Does that work in your budget? How will you be paying for this on the day of the appointment? Write down the method of payment on the sheet, so when the day comes, the team member can specifically ask for their visa, check, care credit to settle the payment. "We offer 3-5% patient courtesy, if you pre-pay your portion today when you book your appointment". Money down ensures patient is vested and will show up.

4 If they don't want to take advantage of the 3-5% pre payment discount, you can ask for ½ of the cost to get started to book the appointment, the other half will be collected at the appointment. Again money down promotes showing up.

Here are some more pointers:

1. Identify disappointers in the am huddle and put them on standby status. Do not book them or you can book them but require their portion prepaid with a 3-5% discount.
2. Frequent disappointers will get a “talk” with the doctor about causing a strain on the practice when they last minute cancel and you could have offered that appointment to someone in pain that you had to turn away etc. They need to be flagged in your system. After they get their talk, the flagging can be removed.
3. Missed/broken appointments get booked out 2 months and put on short call list then called in one week to move up if you have last minute changes in the schedule.
4. The pre-booking interview sheet will be filled out and put in a file with date on it signed by team member. Every day we will pull out sheets then compare to who is in the schedule. We want 100%. Whoever is in the file for that day should also be in the schedule otherwise they moved their appointment. We will keep track and see our score.

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Dr. Dorothy Kassab  
President  
Dental Claims Cleanup  
3649 Erie Blvd East, Unit 10  
Dewitt, NY 13214  
[contact@dentalclaimscleanup.com](mailto:contact@dentalclaimscleanup.com)  
[www.dentalclaimscleanup.com](http://www.dentalclaimscleanup.com)  
(800) 652-3431