

TIME IS MONEY! ELIMINATE THOSE BA'S AND CA'S

As I give seminars and consult with practices throughout the United States, it never ceases to amaze me that the system most frequently in need of help is the scheduling system. Broken appointments (BA's) and changed appointments (CA's) are an expensive drain on the practice. Understanding "why" they occur is an essential first step in reducing and possibly eliminating them. The second step is to learn how to prevent them and the third is to reeducate your existing patients to exhibit greater respect and responsibility toward their reserved time. Finally, to ensure your progress, it is important to track your practice results to see how well your new system is working. Overcoming this practice handicap results in less stress and increased satisfaction for the entire team.

When staff members list the handicaps BA's and CA's create in the practice, almost everyone lists the loss of income to the practice, the time spent changing appointments and the time spent "filling holes" in the schedule. Only a few realize the drain on the team's energy and enthusiasm when patients' no-show or are late. A staff member's good attitude is quickly replaced by frustration with last minute, unexpected changes and at times by complacency: staff may think, "Oh well, I only have 10 minutes now before the next patient is due and there's really nothing I can do in such a short amount of time."

To understand how to prevent and reduce BA/CA's, it is first important to understand why they occur. After studying and surveying patients in hundreds of practices, the common elements were patients who were unaware of vital information. Patients need to know: (1) how the appointment system actually works, (2) their overall treatment planned, (3) the time frame for their treatment progress, (4) the dentist's awareness of any missed appointment, and (5) the dentist's and staff's preparation for each patient's appointment. Patients think the dentist's office staff over-book for each appointment time similar to the airlines. Therefore, the statements: "I won't be missed if I cancel"; "Why is there a problem if I arrive late? They are always running late anyway," are common patient expressions. Most patients do not remember or were never told of the importance of their treatment sequencing and the urgency for their optimal health to complete their treatment within a specified time frame. And finally, patients think the Doctor is too busy to notice whether they come in today, tomorrow, or next week. Patients express, "The Appointment Coordinator is the only one who actually knows if I show up and it's her job to make sure I come in at a time that is convenient for her."; "my dentist will be happy to see me whenever I can come." Once you have an understanding of how the patient thinks and feels, then prevention can be your next step.

Mutual understanding begins with the first telephone call. To begin the prevention step the Appointment Coordinator should discuss with the new patient the "reserved time necessary" to have the Doctor's undivided attention for their "individual and thorough new patient examination." You can reinforce this during the new patient interview process and again during the new patient examination. When the patient arrives for the consult and treatment presentation, they are mentally prepared for a discussion regarding a commitment of time as well as finances.

In today's society, Americans often place a greater or equal value on their time as compared to money. This is often the case with patients who are educated dental customers. Therefore, when making financial arrangements at the treatment presentation, it makes sense to discuss scheduling arrangements also.

Studies have shown that patients place high value on the dentist's opinion during the diagnosis and

prognosis. Discussion of scheduling for reserved time, which comes directly from the Doctor during the consultation, makes the greatest impact.

Example Script:

Doctor: "Ms. Patient, to enhance your smile and create a maintainable state of oral health, time is also going to be an important factor. For optimum results, your treatment plan (or Phase I) should be completed within the next (time) days. During this time frame there are certain appointments that will need my close attention and certain times I need to work closely with my laboratory for the precision required. For that reason, I have reserved special blocks of time during particular days in the week for those appointments. This may mean taking some time away from work. How will this work with your schedule?"

(discussion here)

"Well, Ms. Patient, Amy, our Financial Coordinator, is going to answer your questions about insurance, financial and scheduling arrangements. Before I leave, do you have any other questions of me about the treatment we have planned, the importance of each appointment, or the time frame I have recommended?"

The Financial Coordinator discusses financial arrangements then reinforces the importance of the reserved appointment time and of refraining from any unexpected changes unless there is an emergency.

The dentist lays the foundation for prevention with the patient. His or her conversation at the time of the consult is the key ingredient. The business office staff can then build on that foundation and reinforce the Doctor's desires for special scheduling arrangements. When making the confirmation phone call or when the patient calls in to change an appointment, this foundation also provides the Appointment Coordinator with the information necessary to discourage any change in the patient's reserved time.

Example of step-by-step procedure:

- **Prevention of broken appointment** - starts with the staff stating expectations to patients about the need for a 48-hour notice of any change in reserved appointment time. (BA is defined as no-show or appointment changed or canceled with less than 48 hours notice).
- **Confirmation Script** - "Ms./Mr. _____, Dr. _____ and all of us are looking forward to seeing you on (date) at (time) for (give a specific reason/procedure)." The tone of your voice assumes they remember and are coming. Eliminate using "confirm" or "remind."
- **Types of excuses for a BA:**
 - A. **ACCEPTABLE:** sudden illness, death in the family, personal crisis, etc.

Acceptance Reason Procedure: "Ms./Mr. _____, I can certainly understand why

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Larry M. Guzzardo, Inc.

Dental Practice Management & Marketing Excellence

Brookhaven Hill - Suite 100 Atlanta, GA 30319 Office (404) 842-0530 Fax (404) 842-0820

you were unable to call us in advance about this. Let's reschedule and reserve another time for you. (Important to book 4-6 weeks away from today. You can always call to come in sooner if opening occurs?)

- B. UNACCEPTABLE:** too busy, company in town, car trouble, forgot, "you did not reach them to confirm," busy at work, etc.

Unacceptable Reason Procedure: Use a caring voice tone - not frustrated or angry. The purpose of speaking with a patient regarding a BA is:

1. To maintain a mutually respectful relationship with the patient.
2. To reinforce the Doctor's concern about their dental health.
3. To reinforce the importance of their reserved time.

First Broken Appointment

Step 1) When patient calls, let the patient know you hear them:

- A. Patient: *"I forgot"*
Appointment Coordinator: *"So, it sounds like you were very busy," or "it slipped your mind and you forgot to give us two days notice"*
- B. Patient: *"I had car trouble"*
Appointment Coordinator: *"I know it makes it difficult when your car breaks down and you can't give us a 48-hour notice about this change."*

Step 2) *"Mr./Ms. _____, Dr. _____ is going to be very concerned that your treatment (procedure) will not be completed within the time from he/she felt was best for your dental health. Dr. _____ is going to ask me at the end of the day about the exact reason for your delay; please tell me once more so I can write it in your chart for him/her."*

PAUSE

Step 3) *"To prevent further delay in your treatment progress, let's go ahead and reserve another appointment time for you. Make appointment 4-6 weeks or more away. Giving a next day appointment tells the patient it is acceptable to change because they can get another appointment in a short time. You can always call them again for short notice unexpected openings."*

Step 4) *On the appointment book or in the appointment notes in the computer put a BA-1 beside their new appointment. This notes a first offense and lets you know that if this appointment is broken, it becomes a second offense."*

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Second Broken Appointment

At second BA, patient is given no more reserved time and put on a Quick-Call list and consider requesting a deposit from the patient to reserve their next appointment.

Step 1) *Acknowledge - "Sounds like you are really having a problem at work" (or whatever is their reason).*

Step 2) *"Possibly our special Quick-Call List will work better for you. For patients whose schedules make it difficult for them to keep reserved appointments, there is a Quick-Call List that enables us to call you if we get an unexpected change in the schedule. If you find a day that you are free sooner, you can give us a call to check if we have any openings.*

Step 3) *Document in the chart that the patient is on the Quick-Call List.*

Important Notes to Remember:

1. Always note in appointment book and/or notes when appointment is a rescheduled BA with a BA-1 in red.
2. For patients who BA, place their name on the Recall Log, begin reactivation process and then document in the chart.
3. Document all BA's and CA's in the patient's record in red: BA = No Show, Canceled, or Broken Appointment with 48 hours notice. CA = Changed appointment with at least 48 hours notice
4. Consistency from the Doctor and all staff in communicating to the patient the value of reserved time is the key.
5. The BA/CA procedure needs to be known and followed by all staff members at all times.
6. Place a star beside any patient's name or in the appointment notes who tried to change or cancel an appointment and the Appointment Coordinator successfully discouraged them.
7. If a patient calls to cancel, do not simply respond, "Okay. No problem. Just let us know when it is convenient for you to come in." The appointment is important for the patient's health, as well as the health of your schedule.
8. Most importantly, you must make the effort to help patients keep their appointments. Ask if there is any way that you can help the patient keep the appointment. Do not assume the appointment is lost. It may be as simple as arranging for patient transportation, or reassuring the patient that a common cold is no reason to cancel a dental appointment.
9. Do not ask, "Do you want to reschedule now?" or "Give us a call when you're able to make an appointment." Instead say, "*Let's reschedule your visit now.*"

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10. If a patient cancels appointments without notice, a firm but professional explanation is in order. *"As you can imagine, we have many other great patients just like you who were also waiting to see the doctor. With this last minute notice, there is not enough time for them to rearrange their schedule to see if they could make this appointment. I am always here to help you so let's see what I can do for you now."*

As you can see preventing BA's and CA's and re-educating your patients is a continuous process that requires constant team attention. To keep the entire team on track and let everyone know how well they are doing, tracking your BA's and CA's daily and reporting at the monthly business meeting is essential. To assist you in this process the following monthly monitor is useful if computer reports are unavailable.

Example:

BA/CA/Late Appointment Tracking

Frequent appointment changes indicate a loss in daily planning and appointment control. To track this concern, the monitor needs to be completed on a daily/weekly basis and the totals reported at the monthly business meeting.

Date	Name	Type*	SVD	Fill	Time Lost	\$Lost	Resch.Date	Reason

- * BA = No-Show or Late Cancellation (less than 48 hour notice)
 CA = Changed appointment (change for any reason)
 Lte = Late Fill = Filled TimeTM Lost = Time lost SVD = Saved

Keep in mind that BA & CA's affect everyone on the team. By first understanding the why's then taking three necessary steps:

- (1) Prevention,
- (2) Re-educating existing patients and
- (3) Following through by tracking your results, you can virtually eliminate this costly practice handicap.

Larry M. Guzzardo who has co-authored two books, "Powerful Practice" and "Getting Things Done" conducts in-office practice management consultations exclusively for dentists to enhance trust, create organization, increase profits, and the development of patient relationships that last. Larry has presented numerous workshops including, "Winning Patient Acceptance," "Business Communication Systems," and "The Leadership Challenge."

For more information call 800-782-5770

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