SUDDEN IMPACT SOLUTIONS

NEW PATIENT PROCESS

# THE IDEAL SYSTEM TO MANAGE YOUR CANCELLATIONS AND NO SHOWS

By Amy Morgan, CEO, Pride Institute


In these challenging times, many practices are seeing an increase of cancellations and no shows which creates significant financial and clinical impact. In any economy, having an effective process of prevention, connection, and intervention with patients is the key to reducing last minute cancellations. When done right, the goal is to reduce unfilled hours to 5% or less. Patients no show or cancel appointments for four basic reasons:

1. They do not understand how or why we are treating them.
2. They do not feel listened to.
3. Since they do not understand what we are doing, they may conclude that it is too expensive or unnecessary.
4. Therefore, they choose other ways to spend their, time, money and energy.

Every team member plays a key role in addressing these issues. Once thought to be the role only of the front desk team member, it is imperative that the entire team understands the impact they can have on the patient's commitment to scheduled appointments.

The most recent surveys show that 32% of all patients no show or cancel their dental appointments in any given year. So what's a practice to do? It's all in the fundamentals.

## I. PREVENTION:

New patient phone call – The new patient phone call is a key element in the development of the patient/practice relationship. The first phone call must gather information and communicate the orthodontic practice's vision and values. By using "we care questions" like: "How can I help you?", "Are there any questions I could answer to make your visit more comfortable?", the practice can gather vital information, communicate expectations about the appointment and make the patient feel unique and well cared for.

Courtesy calls - By avoiding the words "confirm" or "remind", the purpose of the call shifts to seeing if the patient has any concerns or questions. "Hello Cindy, this is Janelle from Dr. Pride's office. We're looking forward to seeing you for your next appointment on Tuesday at 11:30 with Bonnie. Is there anything that you would like Bonnie or Dr. Pride to know in advance regarding any health changes or concerns with your teeth before your visit?"

We recommend that this patient contact occur two days in advance of the scheduled appointment in order for the patient/parent to make any necessary arrangements to be at their scheduled appointment. It is assumed the patient will come to their scheduled appointment. If your practice is currently using other technologies such as text messages, emails, or services such as Sesame, the information sent should follow the same system.

Patient Debriefs - The "debrief" is more than post-appointment instructions at the end of a visit. It is a vital tool in the prevention of changes and cancellations.

The "debrief" includes:

- What happened in today's visit (be specific and patient focused)
- Any needed post visit care (expect some pain, etc)
- When the patient must return, and the importance of the next visit
- Answers for any questions or concerns for either the patient or parent
- Information as to who the patient will see at the next visit

During the debrief, the team member builds value for the next appointment and then records this "value" in the patient chart. The front desk team member then refers to this value if the patient calls to delay or cancel an appointment.

The Handoff - In order to avoid patient "amnesia" from the clinical area to the front desk, a purposeful handoff from the clinician to the front desk team member is an essential piece to patient commitment.

It accomplishes the following:

- Reminds the patient about the next appointment which reduces amnesia
- Inspires trust and confidence in the "receiving" team member
- Informs the front desk team member about any changes in today's treatment or the treatment plan
- Alerts the front desk team member about any special needs or concerns the patient may have about the next visit

## II. CONNECTION:

Building value for each patient starts with communication about the patient's specific needs and wants. As team members, we must create WIIFM (what's in it for me) for the patient to want to return for the next visit. Using the patient's assessments/risk factors becomes the purpose behind why the appointments are necessary. This communication is called purposeful conversation. Purposeful conversation builds value for the patient regarding scheduled appointments, thus reducing cancellations and no shows.

So, what happens when patients do cancel?

We must:

- Express care and concern.
- Use information in the patient's chart/computer notes to motivate the patient to keep the appointment.
- Note that rescheduling may mean a lengthy wait for another appointment, compromise the treatment plan or result in an administrative fee.
- Use the appropriate verbal skills to encourage the patient to keep the appointment.
- Ask if there is any way the patient can make this appointment after all.

- If this is the patient's first time canceling, waive any administrative fee and reschedule.
- Note the cancellation in the patient's chart.
- If habitual, remind the patient of any fees and note cancellations in the chart. Communicate with patients regarding cancellations and express concern that lateness/cancellations may interfere with the patient getting the needed care.

### III. INTERVENTION:

In a situation where a patient habitually cancels or no shows for scheduled appointments, we must take some form of action. It is important to clarify the patient's/ parents and the practice's commitment to one another, and to create an agreement to either continue or sever the relationship. The practice must communicate expectations via customer service phone calls, e-mails, texts and/or letters about appointment expectations, the practice's philosophy of care and the patient/practice partnership.

If a patient or parent does not respond to your communications, the team must evaluate its criteria for patient dismissal and make the decision to maintain or severe the relationship. While never ideal, the amount of energy, time and financial impact to the practice may be significant if changes are not made.

So if, at any time, your practice is dealing with perpetual cancellations, don't expect the patient to change, change your system!


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*Amy Morgan is a top dental consultant and CEO of Pride Institute, a nationally acclaimed, results-oriented practice management consulting company. Amy has revitalized thousands of dental and speciality practices using time-proven management systems, so they become more secure, efficient and profitable. Pride Institute is the premier consulting organization for dentists/ specialists and their teams who want to acquire the skills necessary for running a successful practice. Pride Institute offers a nationally acclaimed, results-oriented management program, accredited continuing education management and marketing workshops, on-site training and telephone consultation support.*