The Work Smart Scheduling System

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© Linda Drevenstedt, MS
Linda Drevenstedt, MS, RDH is a wise and insightful consultant with real "in the trenches" office management experience as a group practice administrator. Her lively, fast paced sessions receive high marks.

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*Dentistry Today* has voted her one of the "Leaders in Dental Consulting" for the past 14 years.

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Work SMART Scheduling System Objectives

1. To create a productive scheduling system.
2. To effectively debug current scheduling hassles.
3. To avoid ten schedule killers.
4. To promptly bring the new patient into the practice.
5. To handle emergency patients without ruining the schedule.
6. To schedule procedures for REAL time.
7. To learn the communication skills and have clear intent to keep the scheduling template as agreed.
8. ______________________________________________________
9. ______________________________________________________
Work SMART Scheduling Guidelines

1. **Format** your schedule with columns equal to the number of treatment rooms. There should be a direct relationship between the column in the computer and the actual treatment room in the clinical area.
   
   5 treatment rooms = 5 columns in your computer schedule
   
   An extra column can be used as a break between Dr. and RDH columns or as a column for the Treatment Coordinator.

2. **Record** critical data in each appointment:
   
   1. Patient's name, phone # (where the patient can be reached between 8 - 10 am in the morning.)
   2. Tooth and procedure specifically detailed such as #31 MOD. Use ADA codes in computer to use the goal setting function.
   3. Total chair time
   4. Operator sequence: assistant time / Dr. time / assistant time
   5. Confirmation status
   6. Pre-med information

3. **Use a 10-minute interval schedule.** This step alone can account for 10 – 15% better efficiency.

4. **Track** ALL CANCELLATIONS, no shows, etc.

5. **Begin** each day and after lunch with two patients – ______________________
   ______________________________________________________________________

6. **Schedule** long appointments of full quadrant dentistry for greater efficiency.

7. **Fill** the difficult 10:00 – 2:00 time period ________________________________
   ______________________________________________________________________

8. **Use a Laboratory** control system. Place the symbol your computer uses to indicate that the lab work has been returned. DO NOT confirm the appointment until you are sure the lab work has been returned. It is better to call and reschedule the patient, than to have to call after confirming and reschedule the patient to a later date.

9. **Track** Production vs. Goal Daily for EACH provider.

10. **Preblock** the schedule.
## Work Smart Scheduling System

### Key # 1  Set Practice Goals

**Find** the average daily* production **per dentist** for the past six months.

<table>
<thead>
<tr>
<th>Month</th>
<th>Average per day</th>
<th>Production</th>
<th># of days</th>
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</thead>
<tbody>
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</tbody>
</table>

Average production per day* __________

* Practices with staggered hours or hours which vary through the week should use an hourly average.

* Specialty practices often use a weekly goal.

Once you have the average, add $100 and set the goal for the dentist.

Dr. Daily goal = _______

### Dr. Daily Production

<table>
<thead>
<tr>
<th>Should vary no more than</th>
<th>$200-400 per day</th>
</tr>
</thead>
</table>
Hygiene Goals Setting Calculation

Hygiene goals can be a bit trickier. The first step is to get clean HYGIENE production numbers.

**Hygiene Production per day**

(Please read instructions on calculation of days below):

Hygiene days are totaled as follows:

- One hygienist working one day = one day;
- Two hygienists working one day = two days;
- Half days = half days

*DO NOT INCLUDE the Dr. Exam fee in the production calculation.*

<table>
<thead>
<tr>
<th>Month</th>
<th>Number of day</th>
<th>Production** Dr’s. exam fee is not included</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<tr>
<td>Total</td>
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</tbody>
</table>

Add $25 to the hygiene average to obtain the new hygiene goal.

**Hygiene daily goal = $_____ per hygienist**
**Key # 2  Track production daily and compare to your goals.**

Use the Production Tracking Report, an excel spreadsheet or a computer production to date report by Provider to report at the Morning Huddle. The data must be BY PROVIDER, so that you can, as a team, support the provider who may be behind and High Five the one who is ahead.

**Production Tracking Report sample**

<table>
<thead>
<tr>
<th>Date</th>
<th>Production</th>
<th>Prod to date</th>
<th>Goal to date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
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</tr>
</tbody>
</table>

Provider ___________________    Month ___________________
Monthly Goal _______________    Daily Goal ________________
Key # 3  Preblock the Schedule

Preblock category 1 – daily goal preblocked

Preblock enough time to meet at least 75% of your goal with Primary (rocks, green, major, income producing) Care.

**Primary Care** procedures:
- Crown & bridge
- Denture or partial impressions
- Amalgams & Composites - multiple teeth
- Cosmetic bonding or veneers
- Surgery - perio or extractions
- Root canal - initial appointment
- Implant procedures
- Hospital dentistry
- Orthodontic banding

***************

**Secondary** procedures:
- Crown & Bridge seats
- Removable appts after the initial
- Single tooth amalgams & composites
- Minor extractions
- Root canals - after 1st appointment
- Partial / denture adjustments
- Consults
- Arch wire changes

***************

**Tertiary** care procedures (Water) fill in around preblocked procedures - these are often services that can be performed by an EDDA (Expanded Duty Dental Assistant). In practices with many emergencies, there is an entire chair for an EDDA assistant to care for tertiary care procedures. The dentist checks the patients much like he/she would a hygienist.

- Emergencies
- Post-op checks, suture removal / pack changes
- Recements temps or bands
- Remake temps
- In-office bleaching
- Impressions, photos, delivery for bleaching
- Sealants or pedo prophies - check state laws
- Orthodontic or TMJ records
- Other Expanded Duty procedures by state law
Preblock category II – New patients
Run a report for the past 6 months and find the average number of Adult/Exam new patients.

Preblock category III – PPO dentistry
Run a report of PPO plan adjusted production for a period of 3 – 6 months.

Preblock category IV – Preblock Hygiene
Primary Care for hygiene: Periodontal Procedures New Patients

Secondary hygiene: Routine recall / recare patients Teens and children NP’s
Determine the correct number of blocks:

**Pre-block** enough time in the doctor’s schedule to meet at least 75% of the daily goal*. Take the goal you have for the day and multiply the goal by 75%. For example, if the goal is $3000 then .75 times that equals $2250. Now, take your fee for a crown and divide that into the $2250. This gives you the number of blocks your schedule needs. If your crown fee is $800, then you need 4 Primary Care blocks.

\[
\frac{2250}{800} = 3.75 \text{ round up to 4}
\]

Your practice’s daily goal = $_____ X .75 = $_______ (A)

Your main primary procedure fee = $_______ (B)

___ (A) _____ = _____ number of Primary blocks per day. (B)

**Don’t give away your blocks too soon.** If there is one error that makes practices say that block scheduling does not work for them, it is the front office staff member or the dentist who give away the block for Primary Care or for a new patient too soon to other procedures. It often happens like this – one of your favorite patients fails or misses an appointment and needs to get back in. You want to PLEASE the patient so you use up a block to accommodate their request. This happens especially in the hygiene blocking. The recall patient misses or can’t make their appointment so you give them the new patient appointment or the perio block. AND THEN!! There is no bock for the new patient who calls tomorrow.

**RULE everyone must follow.**

**DO NOT GIVE AWAY THE BLOCK UNTIL 24 hours or the day before that blocked appointment.**
### Sample Blocked Schedule

<table>
<thead>
<tr>
<th>Operatory</th>
<th>1 Code</th>
<th>2 Code</th>
<th>Date</th>
<th>3 Code</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mon.</strong></td>
<td>8:00 Block for Operatory</td>
<td>Block for perio or new patient</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Tues.</strong></td>
<td>8:10 Primary</td>
<td></td>
<td>1</td>
<td></td>
</tr>
<tr>
<td><strong>Wed.</strong></td>
<td>8:20</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Thur.</strong></td>
<td>8:30</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Thur.</strong></td>
<td>8:40</td>
<td>Block for Long Primary Care</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Thur.</strong></td>
<td>8:50</td>
<td></td>
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<tr>
<td><strong>Thur.</strong></td>
<td>9:00</td>
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<td><strong>Thur.</strong></td>
<td>9:10</td>
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<tr>
<td><strong>Thur.</strong></td>
<td>9:20</td>
<td></td>
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<tr>
<td><strong>Thur.</strong></td>
<td>9:30</td>
<td></td>
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<tr>
<td><strong>Thur.</strong></td>
<td>9:40</td>
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<tr>
<td><strong>Thur.</strong></td>
<td>9:50 Secondary</td>
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<td><strong>Thur.</strong></td>
<td>10:00</td>
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<td><strong>Thur.</strong></td>
<td>10:10</td>
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<td><strong>Thur.</strong></td>
<td>10:20</td>
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<td><strong>Thur.</strong></td>
<td>10:30</td>
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<tr>
<td><strong>Thur.</strong></td>
<td>10:40 Secondary</td>
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<td><strong>Thur.</strong></td>
<td>10:50</td>
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<tr>
<td><strong>Thur.</strong></td>
<td>11:00</td>
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<td><strong>Thur.</strong></td>
<td>11:10</td>
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<td><strong>Thur.</strong></td>
<td>11:20</td>
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<td><strong>Thur.</strong></td>
<td>11:30</td>
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<tr>
<td><strong>Thur.</strong></td>
<td>11:40 Block for Primary</td>
<td>Block Perio</td>
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<td><strong>Thur.</strong></td>
<td>11:50</td>
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<td><strong>Thur.</strong></td>
<td>12:00</td>
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<td><strong>Thur.</strong></td>
<td>12:10</td>
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<td><strong>Thur.</strong></td>
<td>12:20</td>
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<td><strong>Thur.</strong></td>
<td>12:30</td>
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<td><strong>Thur.</strong></td>
<td>12:40</td>
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<td><strong>Thur.</strong></td>
<td>12:50</td>
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<td><strong>Thur.</strong></td>
<td>1:00</td>
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<td><strong>Thur.</strong></td>
<td>1:10</td>
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<td><strong>Thur.</strong></td>
<td>1:20</td>
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<td><strong>Thur.</strong></td>
<td>1:30</td>
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<td><strong>Thur.</strong></td>
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<td><strong>Thur.</strong></td>
<td>1:50</td>
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<td><strong>Thur.</strong></td>
<td>2:00</td>
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<td><strong>Thur.</strong></td>
<td>2:10</td>
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<tr>
<td><strong>Thur.</strong></td>
<td>2:20 Crown Prep</td>
<td>Composite Amalgam</td>
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<tr>
<td><strong>Thur.</strong></td>
<td>2:30 Add (+) for each add'l</td>
<td>Add () for each add'l</td>
<td></td>
<td></td>
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<tr>
<td><strong>Thur.</strong></td>
<td>2:40 Tooth</td>
<td>Tooth</td>
<td>Add () for 2 surfaces</td>
<td></td>
</tr>
<tr>
<td><strong>Thur.</strong></td>
<td>2:50</td>
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<tr>
<td><strong>Thur.</strong></td>
<td>3:00</td>
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<td><strong>Thur.</strong></td>
<td>3:10</td>
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<td><strong>Thur.</strong></td>
<td>3:20</td>
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<tr>
<td><strong>Thur.</strong></td>
<td>3:30</td>
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<tr>
<td><strong>Thur.</strong></td>
<td>3:40 New Patient Exam</td>
<td>Emergency Extraction</td>
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<tr>
<td><strong>Thur.</strong></td>
<td>3:50</td>
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<tr>
<td><strong>Thur.</strong></td>
<td>4:00</td>
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<td><strong>Thur.</strong></td>
<td>4:10</td>
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<tr>
<td><strong>Thur.</strong></td>
<td>4:20</td>
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<td><strong>Thur.</strong></td>
<td>4:30</td>
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<tr>
<td><strong>Thur.</strong></td>
<td>4:40 Seat Crown</td>
<td>Root Canal</td>
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<td><strong>Thur.</strong></td>
<td>4:50</td>
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<tr>
<td><strong>Thur.</strong></td>
<td>5:00</td>
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</table>
Know how to enroll patients into the pre-blocked schedule.

Asking the patient when they want to come in is _________________.

The schedule has to be controlled or it will not be productive. This takes Assertive Proactive communication.

Script Sample:

“Mrs. Patient would you prefer Tuesday at 9am or Thursday at 11am?”

“Mrs. Patient, for your first appointment the doctor has time reserved for that procedure on Wednesday at 8am or Thursday at 10:30am, which is best for you?”

“Mrs. Patient, the first appointment will be during school hours. However, for the second one we can schedule after school. Would Wednesday at 8:30am or Friday at 11am work better for you?”

“Mr. Patient, I do not have an appointment available at the time you have requested, however I have that time available the next week.”
Key #4 - Schedule
REAL time for procedures.

Homework assignment:

____________________________________________
____________________________________________
____________________________________________
____________________________________________

Construct your practice Dr./Asst time template.

Unbreakable RULE of PRODUCTIVITY:
The dentist should only be doing those things that require his/her license, skill and education. All other duties including Patient Communication should be delegated to a trained auxiliary. Many dentists waste precious production time communicating to a patient information which a well-trained assistant or hygienist can communicate.

ADA Study: ________________________

Key #5 Use a Routing Slip
Yes, even if you are paperless 😊

☐ To communicate from the clinical area to the front office about the next appointment needs - procedure AND procedure code for time units.

☐ Schedule the next procedure indicated on the Router Slip
Key #6  Avoid Ten Schedule Killers

1. ____________________________________________
2. ____________________________________________
3. ____________________________________________
4. ____________________________________________
5. ____________________________________________
6. ____________________________________________
7. ____________________________________________
8. ____________________________________________
9. ____________________________________________
10. ____________________________________________
Key # 7

Know How To Schedule Emergency Patients

Emergency patients who are scheduled at a time that can delay the treatment of regular patients or cause an office to reschedule regular patients because of running behind are schedule killers.

Emergency patients have a right to receive treatment at the convenience of the practice.

Complete a Telephone Information Slip for ALL emergency patients. See Sample next page.

☐ Emergency patients are not to be scheduled during primary time unless:
   1) ________________________________
   2) ________________________________
   3) ________________________________
   4) You have a dentist and a chair pre-blocked for emergency care.

☐ Emergency patients seen same day:
   ☐ Established  ☐ Non-Established
   1) ________________________________
   2) ________________________________
   3) ________________________________
   4) Missing front tooth

Let the patient know that they can be seen at the time you have – NOT ________________________________.

☐ If the patient is at work, calls with a toothache, and asks to come after work, use this script, "Mr. Patient, if you are in pain, the doctor feels you should take time from work for your problem before there are complications."
**Telephone Information Slip**

Date: ________   New Patient: ___  Pt. of record: ___  Emergency Pt: ___

"Welcome to our practice! We are so glad you called Dr. _______!"

"Who may we thank for referring you to our practice?"

Patient Name: ___________________________________ Child? ____ Age _____

Pronunciation: ____________________

Chief complaint (in their words) ________________________________________________

**Emergency Patient Questions:**

<table>
<thead>
<tr>
<th>Question</th>
<th>How long?</th>
<th>Where?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discomfort</td>
<td></td>
<td></td>
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<tr>
<td>Lost filling / broken tooth / filling?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Denture / Partial Problem</td>
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<td></td>
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<tr>
<td>Gum Problem</td>
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<tr>
<td>Other</td>
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</tbody>
</table>

**Non - Emergency Patient Questions:**

<table>
<thead>
<tr>
<th>Question</th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>So that I can make the appointment right for you, when was the last time you saw your hygienist or dentist?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Would they have any recent x-rays you could get for us?</td>
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</tr>
<tr>
<td>Last FMX / Pan taken?</td>
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</tr>
</tbody>
</table>

"So you will be prepared for your first visit, our fee is between $___ & $___.

Patient was told ________________________________ Fee Est.?_________

Premed? ____  Pharmacy ___________________  Phone______________

"Will you be needing our assistance with any insurance coverage?"

Insurance: Yes__ No____  Policy holder: ____________________________

Policy holder’s SS# ___________  Employer: _________________________

Policy holder’s D.O.B. ___________  Patient’s D.O.B. ________________

Group or policy #_______________ Insurance Co: _____________________

Ins. Co. Toll free phone #____________________

"To save you some time at your first visit, our forms are available on our website, or I can email or mail them to you."

Address: __________________________________________ Phone :__________( H)

City, State, Zip: ________________________________ Phone :____________( W)

Cell phone #_________________ e-mail address: __________________

"Mrs. Patient, we look forward to seeing you on _______. Is there anyone else in your family that I might schedule an appointment for today?"

Comments: __________________________________________

Staff member: ______  Welcome Packet sent: Date: ______ by: _____ APPT: ________

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800.242.5682 www.drevenstedt.com
Two methods to schedule emergencies:

**Method 1**

___ Set ____________________________________________

_____________________________________________________

_____________________________________________________

_____________________________________________________

___ Designate _________________________________________

_____________________________________________________

_____________________________________________________

_____________________________________________________

**Method 2**

At your Huddle ________________________________

_____________________________________________________

_____________________________________________________

"Mr. Patient, the doctor met with me this morning and asked me to schedule any patients with a special need like yours at ____.”
Key # 8 Have a Morning Huddle DAILY.

The Morning Huddle

Morning Huddle is NOT:

- Reading the schedule.
- NOT the place to air your complaints about the day before About anyone's social or family life from last night.
- The Morning Huddle is NOT a monologue by one person.

Morning Huddle IS:

- A short (10 minutes MAX) meeting
- Everyone has a role in the meeting.
- Use an AGENDA
- STAY “On Point”.
- To get everyone aware and efficient during the day
- To avoid “Train wrecks” in the day’s schedule
- To start the entire team on the same page.
- It is a time for the clinical and the front office team to be united in the care of the patients and the care of each other during the day.

Edit the following to FIT your team and practice.
Morning Huddle

Appointment Coordinator

1. **Review** *Telephone Slips* for Emergency patients.
3. **Review** *Production Tracking Report* for Dr. & Hygiene.
4. **Report** the production scheduled for the day for Dr. & Hygiene.
5. **Report** the next 2 Primary Care opening for the Dr(s).

Financial Coordinator

1. **Report** any patients with financial challenges:
   - Use your *Router Slips* to check financial & insurance status.
2. **Review** Collections status. (Optional)
3. **Share** a Thought for the Day (anyone can contribute).

Hygienist

1. **Inform** Dr. of patients with incomplete treatment.
2. **Identify** patients who need 5 year exams, FMX or Pans.
3. **Share** any important personal information.

Assistant

1. **Discuss** comments or questions about treatment, materials, & lab cases.
2. **Share** important medical or personal information.
3. **Decide** with Dr. the best time for emergencies.

Dentist

1. **Share** comments from yesterday’s TLC *(Tender Loving Care)* phone calls.
2. **Share** any patient emergency calls that came in after hours.
3. **Let** the front office know of any important calls coming in today.

All records should be reviewed the day before to keep the meeting brief. Assistants and hygienists use the Pre-planning Sheets. Everyone can make their pertinent notes on their copy of the schedule so that when it is your turn in the Huddle, you are READY to report.
Keep Today Productive First

Keep Today productive first, then keep tomorrow productive!
It is imperative in every practice that the Appointment Coordinator “own” the schedule. The Appointment Coordinator must keep the schedule full enough to make goal. However when the schedule falls apart, the team must support the Appointment Coordinator by covering the front desk while calls are made to other patients to fill the schedule. This is like a fire drill, it must happen to keep the practice productive!!
Develop an Efficient Quick Call List

First the Appointment Coordinator needs to develop a “Quick Call” list. This is list of patients who can be called at the last minute to fill openings in the schedule. This list can be kept in the computer by category of appointment: Primary, Secondary, Recall. The following are patients who should be on the list:

- Patients who have cancelled their appointment with proper notice and need to be rescheduled.
- Patients who have requested to be called for an earlier appointment.
- Patients who are receiving discounted dentistry such as clergy, family members, seniors or other discounted dental patients (not PPO patients).
- Patients who live or work close to the office.
- Patients who have lab work returned and have no appointment.

Keep this list CLEAN. Make appropriate notes every time you call, text or contact a patient on this list. Be sure these notes are available for all to see. Then if you have contacted the patient 3 times and have not scheduled them, then stop and make a request to the patient. Ask if they want to remain on the list because you do not want to become a pest. If they say “No” be sure that information is entered into their clinical record notes.

Script:  Mrs. Patient, Dr. Smith asked me to call you. We have an unexpected opening in our schedule tomorrow at 10:00. He was concerned about your tooth and wanted me to call and see if you could come in tomorrow instead of next week?
## Action Checklist

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<th>Project or Action</th>
<th>Due date</th>
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Scheduling Materials – webinars, e-books and manual are available at –

[www.drevenstedt.com](http://www.drevenstedt.com)

Monthly Practice Management newsletter archives and enrollment –

[www.drevenstedt.com](http://www.drevenstedt.com)
Mid-Atlantic Dental Meeting
March 24, 2016

Ratings: 4 = Excellent 3 = Good 2 = Fair 1 = Poor

Overall Webinar Quality
4 3 2 1 ______________________

Overall Speaker Rating
4 3 2 1 ______________________

Met Objectives
4 3 2 1 ______________________

What specific information was of the greatest value to you?
________________________________________________________________________

What action do you plan to take?
________________________________________________________________________

Was there anything mentioned that you would like for me to email to you?
________________________________________________________________________

Thank You!! I appreciated your comments😊😊

Please check any of the following areas of interest:

_____ Practice coaching, consulting or training

_____ Life Coaching or retreat for your team

_____ Speaking Engagement for another group

_____ e-mail newsletter _________________________________

Name: ____________________________  Position: ______________

Practice: __________________________ e-mail: ________________

Address: __________________________ Phone: ( _______ ) _______

City, State, Zip: _______________________

FAX to: 888.264.6588
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