



OMG! Academy: The Foundations Deliberate Scheduling Action Guide

Congratulations! You have purchased our Deliberate Scheduling Module and are now ready to dive into some of great information. Here in Deliberate Scheduling we will be creating a systematic approach to your schedule. It will have you feeling productive and organized instead of flustered and exhausted. Ready, set, go!

This Module is comprised of 5 Parts:

- Part 1: Who is in charge of the schedule?
- Part 2: Dealing with No-Shows and Cancellations
- Part 3: The rules for Productive Scheduling
- Part 4: Acquiring Proper Documentation for Insurance Submission
- Part 5: Creating a System of Accountability

After completing this Module, you will have...

- ✓ The tools you need to make scheduling a team task
- ✓ An understanding of how the words you use decrease no shows and cancellations
- ✓ A greater sense of confidence in your ability to manage the schedule in your practice
- ✓ Understand how to take the guesswork out of scheduling
- ✓ The tools you need to find the information necessary to submit claims

It is a great misconception that scheduling is the easiest administrative job. That's why when new people are hired, especially ones with no dental experience, they often become responsible for this task. Then what follows is the clinical team complains because the schedule is crazy.

The truth is that scheduling is a difficult job and there is a lot more to it than just "filling the schedule." It's not easy to remember everything when a patient

demands that the scheduling person find something that fits his or her schedule. For example, Mrs. Smith may want to have her crown seated at 8 a.m. on Wednesday. However, Mary, the new office admin, was told that only high-production appointments should be scheduled during that time, so Mrs. Smith leaves the office unhappy.



Part 1 Who is in Charge of the Schedule?

Scheduling in a dental office is often the biggest headache for everyone. We often hear “Who put that patient on the schedule?” or “We can’t see that patient at that time because...” Each member of the team views the schedule with differing agendas.

- ❑ Scheduling Coordinator
- ❑ Dental Assistants
- ❑ Doctor
- ❑ Dental Hygienist



We would like to suggest taking a team approach to setting a scheduling system for your office. This means that the entire team gathers for a meeting – it will take about an hour. The discussion is about all the procedures that are performed on a routine basis, how much time it typically takes and who is needed at various times throughout the procedure. Take into account all the external variables as well. These are times that the doctor can/needs to step out of the operatory.

Things like:

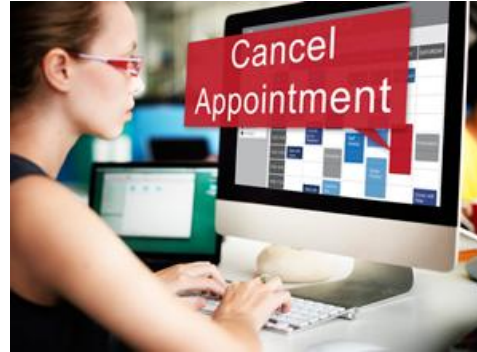
- Hygiene checks
- Post-op appointments
- Anesthetizing the next restorative patient
- Anesthetizing a Scaling & Root Planing patient

By working like a team, your office can have a productive schedule that can also be accommodating to your patients. It's your schedule and you should be in control of it, as a team.



Part 2 Dealing with No Shows & Cancellations

Appointment failures, either by cancelling or not showing, result in the loss of man hours and production for practices. We hear this in just about every office we walk into —
“Today's schedule was beautiful when we left yesterday, but then the phone started ringing today...”



There is no single best way to handle appointment failures. We've all been told that we can help eliminate these failures by impressing upon patients the importance of keeping their appointments. We can do this by using correct and professional verbiage, and while that is true, what if that alone is not working? What else can you do?

Here are some steps to consider helping cut down on broken appointments in your schedule:

- 1- Repeat – Repeat - Repeat
- 2- Get enough information
- 3- Send the appointment information to the patient
- 4- One month out hygiene notification
- 5- One week out hygiene value calls

It is important to pre-appoint hygiene appointments in order to maintain proper oral health. The use of correct and professional verbiage when scheduling appointments helps patients understand the importance of

keeping their recall appointment. By taking a few extra steps to contact your patients prior to their appointment, you help them remember their



appointment, and you have a chance to emphasize the importance of keeping that appointment. This value call allows you ample time to fill the hygiene appointment if the patient must reschedule.



Part 3 The Rules for Productive Scheduling

The office has to have a systematic approach to the schedule. This is what will be the difference between feeling productive and organized or flustered, frustrated and exhausted. By having everyone's input, all aspects of the day are reviewed and considered.

- 1) Declare a daily goal for each provider and for the office.
- 2) Have the doctor(s) list out the ideal day.
- 3) Put guiding blocks on the schedule.
- 4) Methodical Emergency appointments

1- Declare a daily goal:

There is a cost each day that the doors of your practice are open – what is that cost?

What is the daily goal for each hygienist?

What is the daily goal for each dentist?

What is the collection ratio that you aim for on a monthly basis?

Do you feel that it is important to know this information? Why or why not?

In most offices, 80% of the day's goal should be met by: _____

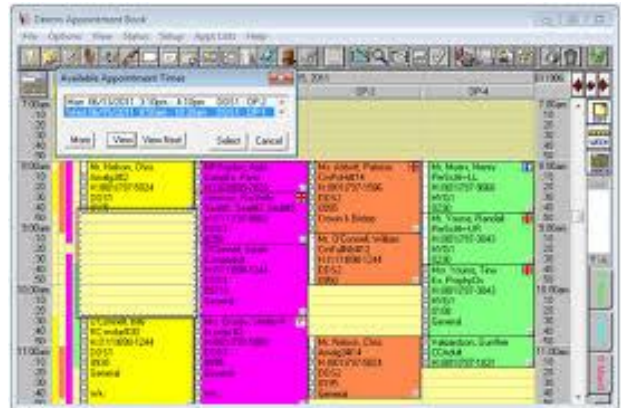
When does your Dr feel most fresh and ready to take on the larger cases?

Does your Dr like to stagger his/her schedule in order to work out of two or more rooms?

3- Block Scheduling:

Would this work in your office?

Have you tried it?



Who should announce the 2 appointment times for the day?

What if the patient can not make the allotted emergency times?

Of course, there will always be adjustments to the rules, but those should be the exceptions rather than the norm. Understanding the rules allows the entire team to work with the scheduler to create that ideal day and make the practice more productive.

One last thought when it comes to the schedule is to build in a little flexibility time, or find time for things not on the schedule so that they can be added without throwing the entire schedule upside down. The doctor has just congratulated a new patient on a perfect check-up, no cavities however the patient might want to consider a night guard since there is sign of wear. The assistant could be ready to take that impression immediately. It's a benefit to the patient and an added boost to the daily production.

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Part 4 Proper Documentation for Insurance Submission

1. **Obtain patient's dental insurance information** -- Items needed:

- ☐ *Subscriber's name (if other than patient)*
- ☐ *Subscriber's DOB*
- ☐ *Subscriber's ID or SSN*
- ☐ *Subscriber's employer*
- ☐ *Patient's name*
- ☐ *Patient's DOB*
- ☐ *Insurance Carrier name*
- ☐ *Insurance Carrier toll free number*
- ☐ *Group number*



2. **Where to get the information** - Use the insurance company's website, a verification service or pick up the phone and call
3. **Verify** that you are sending the claim to the right place (sounds silly but we see this happen a lot)
4. **Utilize an Insurance Verification Form** for consistent data acquisition (see attached)
5. **Enter the data** in your practice management system



Part 5 Creating a System of Accountability



Systems – Protocols – Processes.... these are words that are thrown around often when referring to the function or operation of a business. You often hear 'the business isn't successful because there are no systems in place'; or 'everyone doesn't follow the protocols set down'. Many times when

speaking to the employees, they state that they didn't know that there was a protocol in place; or they weren't trained on the rules.

There is a system, a process, for every action from brushing our teeth to driving a car. Although it can be done, it is not very efficient to put your shoes on before you put on your pants. Businesses need to have systems in place, also, to make things work effectively and efficiently.

How are all your processes?

Is your recall system flawless?

Is your collections management in clear focus all the time?

Does your patient communication protocol hit the mark every time?

Is the flow of the office smooth all day, every day?

Creating a system accountability means that each team member understands what the job is and who is responsible for making it happen. Employee B cannot do her job until Employee A does his correctly. B needs to have permission to take it back to A for correction without any hard feelings or 'attitude'. The collection of standards is what makes the task complete and each standard is important.

Which is why we recommend that each process be written down and reviewed often.

Your turn:

Consider printing out protocols for each major area of your practice.

Your OMG! Academy Coaches

We are pleased to introduce to you the GTS coaches that will be presenting the courses to you.



Janice Janssen, RDH, CFE – Senior Consultant
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When it comes to working at a dental practice, **Janice Janssen** has seen and done it all. Since her introduction into the field as a teen, she has worked as a dental hygienist and in other roles including office management, insurance billing, and collections. As co-founder of Global Team Solutions (GTS), Janice enjoys consulting because it allows her to share her techniques with the doctors, hygienists, and office staff who are on the front line every day. Her zeal for a proven successful periodontal program makes her a real asset to her clients across the country. She is the current treasurer of the Academy of Dental Management Consultants (ADMC), and is a Certified Fraud Examiner (CFE), which positions her as an expert dental practice fraud and embezzlement.

Denise Ciardello – Senior Consultant
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Denise Ciardello always knew she wanted to be an entrepreneur. And today she is co-founder of Global Team Solutions (GTS), a practice management-consulting firm. She is also a professional speaker and published author who brings experience, insight, and creativity into her consulting, along with a sense of humor. Denise's industry distinctions include serving as president of the Academy of Dental Management Consultants and membership in the National Speakers Association, Toastmasters International, and Directory of Dental Speakers.



Christopher Ciardello – Consultant
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As a practice management consultant with Global Team Solutions, **Chris Ciardello** is passionate about sharing his expertise in the areas of technology and marketing as it pertains to the dental office. Chris has a distinctive knack for understanding the needs of an office and he communicates those needs to the team, which creates a cohesive, productive atmosphere. He began his career in dentistry as an office manager after graduating from the University of Texas, San Antonio with a BA in marketing. Chris is a member of the Academy of Dental Management Consultants.