

Failed and Cancelled Appointment Checklist for Open Dental

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| Set Up for Success! | |
| Establish the Importance of the Appointment | "Cleaning teeth is the single most important thing we do for our patients!" |
| Do this before any appointment is made! | Doctor believes this and says it to every new patient! |
| <i>Everyone!</i> | Staff always reminds patients, "Remember, the doctor says cleaning teeth is the single most important thing we do for our patients!" |
| Be sure money is not a hidden reason for failing an appointment | Written payment options for all treatment over \$400 |
| | First payment is due when first appointment is scheduled, not at the first appointment |
| | Offer options that make treatment affordable: <ol style="list-style-type: none"> 1. Prepayment in full with discount 2. Payment during treatment 3. Extended payment plans through an outside agency with or without interest |
| Everyone knows reason for next appointment! | <ol style="list-style-type: none"> 1. "Check at next visit" in recare notes 2. "Cavities always get bigger!" 3. "We don't want you to need a root canal" |
| Let each patient know that you no longer call to confirm appointments | <ol style="list-style-type: none"> 4. "Let me be sure I have your correct email and cell number as we now confirm all our appointments electronically. Isn't that neat? We no longer need to bug you with phone calls!" 5. "We don't double book people so please don't make an appointment you are not sure you can keep and please be sure to keep any appointment you make." 6. "If you need to change an appointment, please promise you will call me at least 24 hours ahead so I can give the time to someone else. OK? Thank you!" |
| Last Minute Cancellations | |
| Try to save the appointment! | "I have patients waiting for appointments with Jillian so it will be a while before I can get you back in." |
| "Check at next visit" notes in charting | "Julian made a note that she wanted to check the bleeding on your upper left" |
| | <i>Always</i> say, "Is there any way you can possibly make this appointment?" - sometimes this works! |
| | "OK, I need to call some of our patients who are waiting so I can give them as much notice as possible. Let me call you back in the next day or so to try to reschedule your appointment." |
| | Do NOT reschedule that appointment now! That's what the unscheduled list is for. |
| "Break" the appointment in the schedule | Right mouse click and "break appointment" |
| | Leave the broken appointment on the schedule so everyone in the office sees that additional time is now available in the schedule |
| | You can move the appointment into a difference column when you fill the open time |
| Send "VIP Missed Appointment" email | |
| Click "ASAP" box at top of appointment box before you send the appointment to the unscheduled list | When you send this appointment to the unscheduled list it will also be placed on the ASAP list so you can use it to fill appointment holes in the future |
| Try to fill the open time | Open the "fill my schedule" button in Open Dental and use the unscheduled, recall, unscheduled tx and asap lists |
| Enter notes | Date-stamp! |
| | Chart why patient missed appointment ("failed without notice," "called to cancel 10 minutes before;" "car won't start," "called to cancel 30 minutes before appointment, had to take sick cat to vet." |
| | Put your name or initials at end of note |
| Move the appointment to the unscheduled list | Right mouse click, send to unscheduled list |
| Alert! "AA Patients" | When a patient fails or misses 2 or more appointments, they should be marked as "AA" or "VIP" patients - do not pre-book for appointments. You use these patients to fill same day appointments if/when they arise. |



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Verbal Skills

“Cavities always get bigger!”

“We don’t want you to need a root canal”

“Cleaning teeth is the single most important thing we do for our patients!”

“It’s the least expensive way to have a healthy mouth”

“Remember, the doctor says cleaning teeth is the single most important thing we do for our patients!”

“I have patients waiting for appointments with Jillian so it will be a while before I can get you back in.

I know she wanted to check ... (refer to charting from last recare appointment)

Is there any way you can possibly make this appointment?”

“Let me put you on our VIP list so I can notify you by text and email of an opening. Isn’t this modern technology great?”

From the doctor when a patient misses or is late:

“We don’t double book and we try really hard to always run on time. Please don’t make any appointment you’re not sure you can keep and be sure to keep any appointment you make.”

Use the “check at next visit” prompt in the autonotes charting for the recare appointment:

Auto Note Prompt Edit

Description: Check at next visit

Type: MultiResponse

Prompt text: Check at next visit

Possible responses (one line per item):

- Bleeding UR
- Bleeding UL
- Bleeding LR
- Bleeding LL
- Recession / Abfractions UR
- Recession / Abfractions UL
- Recession / Abfractions LR
- Recession / Abfractions LL
- Watch for decay UR
- Watch for decay UL
- Watch for decay LR
- Watch for decay LL

Delete

OK

Cancel

