

Best Practices

Unscheduled Treatment Plan Follow-Up:

There are many daily habits and tasks that can will improved follow up from the unscheduled treatment list. However, nothing trumps the habit of starting this practice chairside. All case acceptance whether there is a 'yes' today or on a subsequent follow-up call, starts with solid communication from clinician to patient. The process of using handoffs and an organized appointment flow encourages a simpler way to 'yes' for the patient. Consider those items along with the steps below to improving case acceptance and scheduling treatment.

4 critical steps for unscheduled treatment plan follow up:

- 1 An agreed handoff checklist is followed with each patient.
- 2 Restorative and hygiene assessment checklists are being followed with all patients e.g.,-intraoral photos, patient's primary concern, patient goals, completed charting.
 - ▶ Complete assessments lead to complete diagnosis resulting in a clear outline for care
- 3 Completed notes that end with an RFR (Reason for Return)
- 4 Accurate and complete treatment plans in the practice management (PM) software.

Questions that help prompt a clinician to get clear on where the patient may want to go next. After the 'no, I don't want to schedule today.'

- ▶ (softer approach) "May I ask when would be a good time to follow up on this?"
- ▶ (clear, more direct approach) "What I'd like to do is give you a call next week, let's try Thursday to follow up on this."
- ▶ (if it's a financial barrier – softer approach) "May I ask if we just set aside the financial aspect for a moment, are there **other** barriers getting in the way of you moving forward?"
- ▶ (if it's a financial barrier – clear, more direct approach) "For a moment, let's set aside the barrier of finances, we'll come back to that, are there any other barriers to moving forward with this?"

Remember to clearly document those stated items patients share during these conversations. They are critical in the follow-up calls and subsequent conversations.

To monitor daily unscheduled treatment plan follow up, secure these steps:

- 1 Determine an owner. Someone in the practice must be the owner of this process. This does not mean they do it all. This is the primary lead for running reports, reporting out successes or lack of commitments from the team.
- 2 Analyze the open time and availability of the clinical schedule. Avoid making calls that create urgency to schedule if open time in the schedule is 8+ weeks out.
- 3 Run weekly unscheduled treatment report.
 - a. Start with the most recent follow-ups. Prolonged lack of follow up will result in difficulty getting patients re-engaged in the scheduling/acceptance process and may eventually lead to the need to schedule a consultation to clarify treatment recommendations and expectations.
 - b. Using clinical notes, get clear on the plan, conversations, and agreements made.
- 4 If using Dental Intel, utilize **Follow-Ups** for this metric. Use the settings within Follow-Ups to set up the parameters that will prompt the follow-up.
- 5 Utilize a phantom column in the schedule that would include follow up blocks with patients' names. These blocks would be found on the day you and the patient agreed to follow up and call.
 - a. To utilize this in the PM software find the unused or unscheduled column with no patients scheduled. This column becomes the phantom or follow-up column.
 - b. A common practice for setting these up in your PM software is to create an 'event' on the day you agreed to follow up with the patient. In the notes section add details to ensure accurate and critical information is accessible when making calls.

Best Practices for setting up a timeline and making calls:

There are a few simple but clear steps that must be taken when making the calls to patients.

- ✔ Encourage patients, unless stated otherwise, that "our office likes to check in with you about this treatment plan in 2-3 business days."
- ✔ Document! Document! Document! The outcome of all calls is a necessity in future treatment plan follow up success. Keep in mind that the better the documentation is during these calls the better chance you have at setting up your team members for success in scheduling outstanding treatment.
- ✔ Be curious. Find out what (not why!) is getting in the way for this patient to move forward.

STOP ASKING THESE QUESTIONS:

- Do you have any questions for me?
- Did you want to go ahead and schedule?
- Did you have enough time to think about it?

*Each of these questions end with a simple yes or no reply. This creates a need for new questions to move the conversation along. That's hard work, don't do that!

START ASKING THESE QUESTIONS:

- ✔ What questions have you thought of since you were here for your _____visit?
- ✔ Let's talk about scheduling for that _____, tell me what you're thinking?
- ✔ Tell me what you've been thinking about the _____ treatment you and Dr./RDH spoke about?

*The difference offers the patients to share, and you to learn versus a response to yes and no questions. Practice these, they take some time to get used to.