



There's A Hole in My Bucket Strategies for Filling Voids in Your Schedule & Maximizing Practice Production

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“Scheduling is the Heartbeat of your practice.”

~ Cathy Jameson

Scheduling Difficulties are caused by:

- ⇒
- ⇒
- ⇒
- ⇒
- ⇒

9 Essentials of Scheduling

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

1. Schedule to a Production Goal

S: _____

Break it Down:

M: _____

A: _____

R: _____

T: _____

NOTES: _____

2. Delegate all legally allowed by State

Dental Assisting National Board
[www. Danb.org](http://www.Danb.org)

Notes: _____

3. Determine Doctor and Assistant Time

⇒ Procedure Analysis sheet _____

⇒ The “X” Factor _____

Notes: _____

4. Dovetail the Scheduled Appointments

- ⇒ Providers can't be in the same location at the same time
- ⇒ Use Procedure Analysis times to automate code scheduling
- ⇒ Save time for the hygiene evaluations
- ⇒ Never shorten an appointment to "squeeze" in an emergency

Notes: _____

5. Maximize the Scheduling Program

- 10-minute increments (*for most practices*)
- 1 column = 1 chair = 1 assistant
- For effective dovetailing, 2 assistants per doctor
- Utilize as many program features as possible
- Detail the appointments and attach codes
- Detail the Doctor and Assistant units
- Track the scheduled production for each provider and the practice
- Schedule **regular** training for new features

Notes: _____

6. Schedule a Variety of Procedures into Every Day

Primary

= _____ Examples: _____

Secondary

= _____ Examples: _____

Tertiary

= _____ Examples: _____

Notes:

7. Pre-Block your schedule days

Strategy: _____

Hint: _____

Hint: _____

Consider: _____

Promise: _____

Alternative of Choice: You like both answers and the patient still has a choice

*"Mrs. Jones, Dr. Jameson needs about one hour to prepare your tooth for the crown that he has recommended.
This is a very special procedure and Dr. Jameson and his clinical team want to give you their full attention. So, we reserve specific times throughout our schedule for these appointments. Tell me, Mrs. Jones, are mornings or afternoons best for you?
Mornings? Great, Dr. Jameson has a crown appointment available on Monday at 8:00 or on Wednesday at 10:00.
Mrs. Jones, which of those appointment time would be best for you?"*

8. Strategic Approach to Emergencies

- Define a “true” emergency in your office according to your doctor
- Procedure Analysis for the appointment:
- Seat and Greet, MHx Review, BP, Goals
- Diagnostic radiograph(s) and photographs
- Diagnosis, tx plan for the complaint and palliative tx if needed
- Check out patient and turn the room around
- Determine in your Daily Huddle where to schedule
- Pre-heat the patient for what will (and won’t) happen
- Do not offer to complete/definitive treatment

Unless.....

1. _____

2. _____

“The doctor will want to see you today and we reserve special time on the doctor’s schedule every day for emergencies.

Our emergency time this morning is at 10 or 1:30 this afternoon. The doctor will begin to get you comfortable and determine what the tooth needs. We can then schedule another appointment for the needed treatment.

Our fee for the emergency visit and necessary radiographs will begin at \$97. We ask that all patients take care of this on the day of the appointment. We accept several forms of payment.”

9. Intentional and Complete Communication

What’s missing?

-
-
-
-
-
-
-

Benefits of the 3x5 Minute Checkout

- ✓ Saves _____ per patient at checkout
- ✓ Better _____ sequence
- ✓ Improves _____
- ✓ Reduces _____ for everyone
- ✓ Clarifies _____ for today’s and future appointments
- ✓ Improves patient _____
- ✓ Enhances patient care & _____
- ✓ Reduces _____, & late reschedules
- ✓ Enhances _____
- ✓ Offsets _____
- ✓ Enhances _____
- ✓ Improves _____ in data transfer

Doctor Evaluation or Treatment is Completed

- Doctor recaps, eye to eye, knee to knee
- What we did today and why
- Treatment recommended – Power Words = “I recommend”
- What we will do next time and the risks if treatment is not completed
- How long will we need to reserve on the schedule
- Ask for a commitment (*if not scheduled*)

Doctor Completion of appointment with patient:

“Mrs. Jones, today we completed the crown on the upper right. Everything went great and you did wonderful. We are excited about the long term results you are going to have with this crown. I will need to see you again to complete the fillings on the upper left to remove the decay that is developing there. We will need to reserve about an hour of your time and my time.

What questions do you have about today’s treatment or your next visit?

Is there anything that would keep you from scheduling this appointment today?

Danya will complete your appointment for you. Sit tight and she will take great care of you.”

Notes: _____

Assistant Completion of appointment with patient:

“Mrs. Jones what questions do you have about the crown we did today, or the fillings we need to complete at your next visit?

*Great, let’s go to the reception desk and the business team will schedule your next appointment and give you your **receipt** for today.”*

Notes: _____

Assistant Handoff to Business Team

“Kim, today we provided a crown on the upper right for Mrs. Jones because that tooth was cracked. It looks beautiful and she did wonderful.

Dr. Jameson would like see her next for the fillings on the upper left to remove the decay, and we will need an hour reserved for this procedure.

Mrs. Jones, Kim will take care of you from here. Should you have any questions, please call us. Here are two business cards, one for you and one to give to a friend.”

Notes: _____
