

## Unscheduled Treatment Follow Up Policy

**Purpose of Policy:** The intention when diagnosing and presenting dental treatment to patients is to help them understand their condition and get the treatment needed to get them healthy. The hope is that patients will understand and want to get the treatment scheduled when it is presented but that does not always happen. For different reasons, a patient cannot schedule the treatment immediately at presentation and it becomes the responsibility of someone in the office to follow up with the patient to ensure they schedule.

It is important to understand that many times, patients are not excited about getting the dental work done and will not call in to schedule on their own. It is the responsibility of the dental office to reach out to the patient and attempt to get them scheduled. There is a balance between getting in touch with the patient in a timely manner so that they understand the urgency to get the treatment done but not bug them so much they get annoyed and don't schedule at all. The following is a recommended timeline of follow up with the patient if they don't schedule at the time the treatment is presented.

Suggested Follow Up Times:

- 1) **Agreed Upon Time:** during the presentation, if there was an agreed upon time to talk next, that would be the time to follow up. For example, if the insurance company needed to be called and the next business day they can be reached, then follow up then. Another example would be, if the patient needs to speak to their spouse and the plan was to talk with them over the weekend, then the follow up would be on Monday.
- 2) **24 – 48 hours After Presentation:** If no time was agreed upon, there should be a follow up made within 2 days of the appointment. This is important because the treatment was presented to the patient as needed but if the office does not show a sense of urgency with follow up the patient might start to wonder how necessary the treatment was.
- 3) **Weekly thereafter up to 4 times:** Weekly follow up should be done to get the patient to schedule. The intention is to let the patient know that this is important and work with them to get them to get the treatment done.
- 4) **Follow up with Doctor for next step decision:** At this point, there are two ways to go with the unscheduled patient. The first is to continue to reach out to the patient to get them to schedule until they do schedule, or they tell you to stop calling them. This might be the suggestion of the doctor if the treatment they need is vital and waiting would put them into jeopardy of a worse scenario. For those patients that need work but will not potentially lose teeth or jeopardize their dental condition too much, it may be decided to hold off continuing to call them or only call them once a month moving forward, however make a note in their next preventative appointment to discuss the treatment plan with them again at that point.

Final Thoughts:

**Use technology to help:** Phone calls are important in this process because the patients need to hear your intention to get them scheduled and that you care about their dental health. However, combining that with emails and text messages will help increase the odds of getting them to schedule. Many times, a patient will hear the voice mail message and then respond to the following text or email.

**Mention Doctor's name:** Anytime when reaching out to the patient, it helps to mention the doctor asked you to call them. Patients like to know the doctor cares and will potentially be more likely to schedule, if they think the doctor wanted them called.

**Have the right intention:** When following up with patients, it is important that your intention is to not just call them to remind them they have outstanding treatment but to want to get them to schedule. People are not typically

very excited about getting dental work done and paying for it so it is important that the person calling them from the dental office has the right intention of helping the patient make the right decision and schedule to get the treatment done.

**Review patients with outstanding treatment with doctor regularly:** Many times, the patients tell the doctor they will schedule for the dental work and then don't. It is important the dentist is kept in the loop on the patients that don't schedule so that they can either help with suggestions of how to get them to schedule or minimally, at least know who did or did not schedule. This meeting will help to possibly get more patients scheduled and/or help the doctor know where they need to improve on presentation skills for future patients. The goal is to get more patients to schedule and get treatment done so more patients can get healthy and keep their teeth for life.