

Verbiage: Language Skills for Recare

Courtesy Calls – 2 days prior:

“Hello, [patient]. I am calling regarding your upcoming appointment and calling you as a courtesy. At your last visit you reserved the time for your preventive appointment with [hygienist] on [day and time]. We are looking forward to seeing you then.”

If a 2-day approach is a new concept for the practice, it will take time for all scheduled patients to embrace this, so the language must be very specific about the appointment DAY when confirming AND when scheduling to prevent patients from making habitual assumptions that the courtesy call means their appointment is the following day.

For those who call YOU to schedule when they receive a card or letter:

“Thank you so much for contacting us. It’s great when we don’t have to disturb our patients. The best time for you to see your hygienist is either at _____, or at _____. Which one would work better for you?”

Offering two choices gives you control of your schedule while still giving your patient some flexibility. Once an appointment is found, continue with:

“We consider the time confirmed and reserved when we make the appointment. However, we do offer to place a call 2 days ahead as a courtesy.”

Pause and wait for the patient to respond – they will tell you if they need a reminder.

-or-

If your office offers email reminders, text messages etc. you may word the offer of the courtesy call in this way:

“We consider the time confirmed and reserved when we make the appointment. However, we do offer to place a call, send an email or text message 2 days ahead as a courtesy.”

Allow the patient to choose the best method of contact and if they would like another call. Document and set the preference in your software.

If the patient relays that this is the final contact mark the appointment as “firm” by changing its status. If patients want a courtesy call, mark the appointment “courtesy needed” in the computer. These codes usually include color indicators beside the actual appointment or they may include notes attached to the appointment or attached to the day of the courtesy call.

Patients you call to schedule after they’ve received a postcard or reminder call:

Despite your best efforts at value creation and stimulating patient calls, there will be some patients who do not pre-appoint and do not call to schedule an appointment when they receive the card.

For patients *without* a scheduled hygiene appointment:

"I am calling as a follow-up. Did you receive your postcard in the mail indicating that your preventive care appointment with our hygienist is due?"

Allow time for a response.

We want to keep you on track. [Hygienist or Drs. Name] has noted in your chart that XX months is your ideal preventive interval. [Name] is available either at _____ or at _____. Which one would work better for you?"

Again, offering two choices gives you control of your schedule while still giving your patient some flexibility. Once an appointment is found, continue with:

"Great, we have reserved the time and are all looking forward to seeing you on _____ at _____."

Complete the call with one of the options for offering a courtesy call.

When patients wish to schedule *more than 4 weeks past their due date* let the patient know that this is a significant delay and ask if they might be available sooner if another appointment is available.

Overdue Calls:

Always look at the chart when making these calls (or the computer, if chartless) and consider one of these customized approaches:

- "I know you and [Dr. XXX or Hygienist] have worked hard to maintain your dental health. Your preventive visits are the best way to keep you healthy."*
- "[Hygienist or Dr. XX] noted that they are working with you to XXXX, I would like to help by finding an appointment for you in a timely fashion."*
- "I see there are areas of concern the doctor noted at previous visits and we want to observe them carefully until you are ready to have those cared for"*
- (It's not always about dentistry – it can be about overall health.) *"Your medical history indicates that you are taking medication for XXX. Your preventive visits have a positive effect to prevent further"*

If the patient is receptive, continue to explore the maintenance issue.

"Wonderful. As you know, Dr. _____ has a hygiene team who are also dedicated to the maintenance of your oral health. They plan their treatment appointments based on the condition of your gums and health when you see them."

For Patients who are overdue and refuse to schedule:

"Hello, [patient] this is [name] from Dr [name]'s office... how have you been?"

LISTEN.

"For some reason I see that you are (X) months past due, and the doctor has asked me to call you because we are concerned."

-or-

Let's talk about how we can support you to keep your teeth for a lifetime. Dr. _____ feels that in order to best serve his/her patients in a preventive way, he/she recommends that you follow through with your

hygiene care and undergo a dental examination at least once (twice) a year. How do you feel about this concept?"

-or-

"Mrs. _____, Dr. XXX is really concerned because it has been so long since you were in our office. Please help me understand if anything has occurred that would be a factor in you not returning...if it is anything that I (we) have done, it would be very helpful for me to know so that I (we) can prevent it from happening with another patient. What can we do to help you remain healthy?"

Language for overdue recare patient who has a clinical appointment with the doctor:

"Hello, [patient], the doctor has asked me to call you. You have reserved time to see doctor on [date] at [time] and we are looking forward to seeing you. The doctor is concerned that you are past due for your preventive visit with [hygiene name]. I can ensure that [Hygienist name] has availability on the same day at [time], right before you are scheduled to see Dr. XX. The doctor is concerned that you maintain your preventive cycle of [every x months]. May I go ahead and reserve that time for you with [hygienist name] and we can take care of both appointments that same day."

Cancelled and No-show Appointment Lists:

Patients who HAD scheduled appointments and who failed or cancelled without rescheduling must be contacted so they understand that the preventive visit is *important* to their overall health. Contact all patients who fail immediately, and contact patients who cancel (based on the practice protocols and preferences) the following day. Communicate the value of the missed appointment and urge the patient to schedule again. Waiting too long suggests that it's not that important to you – therefore, it won't be important to the patient.

Internalize the Cancellation Analogy in your own words and use it for these cases. It is a progressive strategy for motivating chronic cancellers to modify their behavior.

For the patient who fails an appointment, changes it often with short notice or cancels:

"I know in the past, your schedule has not allowed us the opportunity to see you regularly...is there anything we can do to help you?"

Other Options:

- For the patient who has had major restorative work:**
 - "You have had wonderful dentistry done in the past. In order to protect your investment, Dr. XXX recommends that you maintain an ideal preventive cycle of [every x months] and you are (X) months past due. What time of day is best for you...I will be more than happy to reserve that time for you now."
- For the patient who has incomplete treatment:**
 - "The doctor diagnosed treatment to be done that is still incomplete...how is everything feeling?"
 - STOP &LISTEN.
 - We are committed to monitoring these areas carefully and advising you of any changes. In this case particularly, it is advised that you maintain an ideal preventive cycle of [every x months] and you are [X] months past due. What time of day is best for you...I will be more than happy to reserve that time for you now."

Documenting Calls:

Establish a firm protocol for the area within the software for documenting the results of all communication pertaining to scheduling preventive appointments, particularly when the patient resists scheduling. This will prevent too-frequent or less than ideal contact to motivate the patient to engage in your preventive care program.

Verbiage: Language Skills for Last Minute Changes

For patients calling in to cancel or reschedule their appointment:

Option #1:

“Mrs. Smith, I am so sorry to hear that you are not able to make your appointment today. Is there anything we can do to help you keep this appointment? (pause) We do have one hour reserved today with _____, your hygienist (or with the doctor). (pause) Unfortunately, Mrs. Smith, there is no availability in _____’s schedule before 6 weeks. Let’s schedule your appointment together in 6 weeks and should something become available before then, may I give you a call?”

Option #2:

“Mrs. Smith, I am so sorry to hear that you are not able to make your appointment today. Is there anything we can do to help you keep this appointment? (pause). I know that _____, your hygienist (or the doctor) was looking forward to seeing you today. I see from her (his) notes that the plan was to focus on _____ during today’s visit to ensure you remain healthy. (pause) Unfortunately, Mrs. Smith, there is no availability in _____’s schedule before 6 weeks. Let’s schedule your appointment together in 6 weeks and should something become available before then, may I give you a call?”

Option #3:

“Mrs. Smith, I know how much your hygienist was looking forward to seeing you today. As was discussed at your last visit, she reserved this hour for your appointment and confirmed this with you at your last visit to the practice. When our patients don’t give us the required 48 hours’ notice, it makes it extremely difficult for us to offer the same courtesy to other patients that are anxious to get into our practice. Is there any possible way that you are able to keep this reserved appointment with your hygienist today?”

Option #4:

“Mrs. Smith, I am so sorry to hear that you are not able to make your appointment today. Is there anything we can do to help you keep this appointment? (pause) Have you been made aware of our policy for last minute changes? Mrs. Smith, we do have a fee for less than 48 hour changes to appointments. However, since you were not aware of this policy, I will ensure that the fee for today’s visit is waived. Unfortunately, there is no availability in _____’s schedule before 6 weeks. Let’s schedule your appointment together in 6 weeks and should something become available before then, may I give you a call?”

Verbiage to Increase Referrals and Social Media Reviews

1. “Mrs. Smith, we love having you as a patient and in fact would love to see patients like you all day long. Please send patients who are just like you our way and we promise to take great care of them.”
2. “Mrs. Smith, you are one of our favorite patients. If there is anyone you know that is in need of a dental home, please let them know about our practice.”
3. “I am so pleased that you enjoy your smile and that we could be a part of helping you with your goals. Please let others around you know that we love to do this type of treatment for people and would enjoy helping others like you.”
4. “Here is a card that you can offer your family and friends. Please share it with someone who needs a dental home. We would be honored to care for them.”
5. “Dr. _____ is very thorough and loves to do this type of treatment. Let those around you know that we welcome new patients to the practice. You can offer them this card. When they call our office, tell them to let us know they were invited to our practice by you and we will take extra special care of them.”
6. “Most of our patients are invited to our practice by other patients. We enjoy meeting new people and would love to have more patients just like you.”
7. “You are one of our favorite patients. We enjoy treating patients like you so let those around you know that we see new patients.”
8. “Here is a special card to share with someone you care about. We would be honored to care for anyone you would invite to our practice.”
9. “You may know of someone who has had a similar situation. Let them know about us. We would be happy to help those around you who may need a great dentist.”