

## **Appointment book management: Top tips**

- The following tips are based on feedback from a range of different prototype practices
- The aim is to help you manage your book efficiently, and provide a patient-focussed service whilst maintaining patient access
- Not all the tips are likely to be applicable to your practice: you will need to consider which ones are relevant to the type of population you serve

The tips are divided into three groups. You can pick and mix according to your type of practice and your patient population.

## Structure

- Zoning
- Make time for urgent care
- Realistic appointment times

## Managing patient flow

- School holidays
- All day opening
- Early mornings & evenings
- Triage

## Practice administration

- Use email, mobile phones & social media
- Booking next appointments
- Keep a standby list
- Seek patient feedback

## Structure tip no 1: Zoning

Have a strategy for managing your book

- A day full of OHAs can limit access for patients requiring treatment
- A full day of RCTs can cause problems if there is insufficient supply of the right type of materials or equipment

Efficiency can be maximised by splitting up each day into different zones setting aside time for:

- Urgent slots
- Oral health assessments (OHAs)
- Treatment
- Interim care
- Oral health reviews (OHRs)

## Structure tip no 2: Make time for urgent care

Always include urgent slots each day

- Allow time for urgent care every day to ensure patient satisfaction and provide good access
- Keeping urgent slots to the end of the morning session allows clinicians catch up time if no patients turn up

Evidence indicates that the requirement for urgent care remains fairly constant

- Map the pattern in your practice over, say, 6 weeks, to work out the number of slots you need each day and when to have them

Patients in pain who cannot get a same day appointment may go elsewhere to get treatment

- Such patients come straight off the practice's capitation list, which affects the practice income

## Structure tip no 3: Set realistic appointment times

Agree as a practice team what is a realistic time to allow for each type of appointment

- The reception team can then structure the appointment book taking account of all the clinicians working across a particular day

Don't mix up appointments for oral health assessments (OHAs) and oral health reviews (OHRs)

- Appointments for OHRs should require less time

# Managing patient flow tip no 1: School holidays

## Make use of school holidays!

- Targeting family or children's appointments during school holidays helps to reduce patients failing to attend (FTAs)
- If a dentist is on holiday and there is a spare surgery.... run OHE clinics staffed by suitably qualified EDDNs

## Where possible book family appointments

- Send a reminder the day beforehand
- If it's a very large appointment slot, you might wish to consider a quick telephone call to check family will be attending
- Ask the patients to arrive 10/15 minutes early to get through the Medical and Social History forms. OR share the forms with the patient before the appointment

## Managing patient flow tip no 2: Open all day

If possible, avoid closing at lunch times, by staggering performers' and staff lunch breaks

- This relieves pressure at reception at the start and end of “traditional” lunchtimes
- As a minimum ensure that phones are manned over the lunch period

This tip may not be suitable for smaller practices

- Create a separate staff room where staff can eat their lunch

## Managing patient flow tip no 3: Early morning and evening appointments

Opening before 9.00 am and closing after 6.00pm once or twice a week will help to capture commuters

- For example, consider a start early/finish early day (7am – 3pm) once a week... or the reverse
- Even some staff will love it!

Offering this type of flexibility is good customer service....

- ...but consider what would best suit your practice population
- ... it may also help boost your capitation



## Managing patient flow tip no 4: Use triage

Develop a triage system that the reception team can use to manage patients requiring an urgent appointment efficiently

A triage system is simply a set of patient centred questions to determine:

- The severity of the problem
- When the patient should be seen
- The most appropriate pain management advice
- The most appropriate clinician to see the patient

## Practice administration tip no 1: Use email/mobile phones and social media

Most patients now use mobile phones, email and social media websites such as Facebook

- Collect and use patients' email addresses and mobile phone numbers - some dental software systems enable this information to be mandatory for reception to collect
- Find out if the patient uses social media websites as this may be their preferred means of communication

Social media websites can be a useful way of communicating messages to your patients, for example:

- Appointment reminders
- New practice services
- New members of staff
- Changes to the practice
- Seeking patient feedback

## Practice administration tip to 2: Booking next appointments

Book the next appointment as the patient leaves the practice

- Always do this for treatment/stabilisation appointments
- To avoid appointment book congestion, you may wish to send a recall asking patients to get in touch regarding appointments for interim care or OHR
- It's quicker, easier and more successful at retaining patients - best of all, it's cheaper!

Then send reminders....

- .....more than once and by different methods
- Evidence shows that patients respond better to reminders than recalls

## Practice administration tip no 3: Keep a standby list

Cancelled appointments are inevitable – so plan for them!

- You may also find it useful to record the pattern of FTAs over a month or so you know what to expect

Keep note of patients who are able to attend at short notice and fill cancelled appointments

- Maintain a standby list to help minimise wasted appointment time (most software systems can do this)

## Practice administration tip no 4: Seek patient feedback

Ask patients what they think about your appointments system

- Conduct a mini-survey
- Use a comments/suggestion box
- Consult your patients - consider using Survey Monkey (free on line)

Provide feedback

- Advise what changes are being made as a result patient comments