Advanced Practice
M A N A G E M E N T

Shelly Ryan RDA, Dental Management Consultant
Website: www.AdvancedPracticeManagement.com
Shelly@AdvancedPracticeManagement.com ● 952-921-3360

SCHEDULING AND CAPACITY CHECKLIST

For the Month of _____

Person Responsible _____

_____ Are the Blocks in place? (New Patients, Perio, Emergency, Urgency and Production Blocks?)

_____ Are Blocks utilized correctly?

_____ Block availability - next open block, per block type

_____ Role play cancellation verbiage for same day schedule changes

_____ Is the clinical team calling patients who fail?

_____ Role play clinical team verbiage regarding failed patients.

_____ Is the clinical team making "selective preconfirmation" calls?

_____ Role play verbiage

What is the down time as a percentage of available hours in hygiene _____? In op schedules _____? (less than 12% capacity challenge, more than 20%, be sure systems are being worked)

_____ When is the next available opening if downtime is less than 12% (not counting today or tomorrow).

- Recall

    o What was our appoint ahead percentage last month?   _____%

    o Were all the other patients that had set up appointments confirmed one or two days in advance? Yes _____   No _____

    o Were patients who did not previously set up an appointment sent a card and followed up with a week later with a phone call? Yes _____   No _____

- Delinquent Recall:

    o Did we send out cards or letters to people 3, 6, 9 and 15 months past due and follow up with the calls about one week later? Yes _____   No _____

    # on 3 month list   _____
    # on 6 month list   _____
    # on 9 month list   _____
    # on 15 month list   _____

    Total # cards sent to past due patients _____

Total # of calls made to these patients (see Calls Tracking Form) _____
Total # of delinquent patients schedule*d* _____

Do we have enough openings <u>this month</u> to support 20% - 30% of patients on the recall list assuming they schedule? Yes _____   No _____

- o How many e-mail addresses _____ and cell phone numbers _____did we gather?

- o Do we have at least two hours after 5:00 each week to reach people we couldn't reach during the day? Yes _____   No _____

- o Could we fill additional hygiene time next month? Yes _____   No _____

- Role Play Appoint Ahead Semantics