

## Effective Systems for Rescheduling Missed Appointments

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In my previous article, "An Ounce of Prevention," which appeared in the July 29 issue of *DC*, I focused on systems that can be used to minimize missed appointments. In this article, I will cover effective systems for dealing with the inevitable, keeping in mind that our goal is to reschedule the patient for another appointment as soon as possible.

When patients miss their scheduled appointment, it is recommended that you contact them within 20 minutes. Once again, I use CA trainer Sherry Hodge's "Scripts for Success." Here are some of her recommendations and scripts for handling a variety of situations that result in missed appointments.

**Situation:** The patient had an appointment at 9 o' clock this morning. It is now 9:20 a.m., and we are calling her home. She answers the phone.

**Script:** "Hello Mrs. Simpson. This is Lisa from Dr. Needham's office. We had your name in the appointment book for 9 o' clock this morning (pause). I need to reschedule this appointment as soon as possible."

**Considerations:** Do your best to reschedule the appointment today. Do not say that the patient "missed" an appointment or that you missed them, as this insinuates the patient is in the wrong. We do (rarely!) make mistakes and we definitely do not want to make the patient seem "wrong." You may even find that the patient is in the appointment book twice or had come in for a treatment earlier. If this is an "old" appointment, ask the patient politely to remind you next time if they think they have another appointment in the book, so you won't inconvenience them again.

**Situation:** Patient says she is feeling so great that she doesn't feel she needs to come in until her problem starts to bother her again.

**Script:** "I'm glad to hear you are feeling so good. I really want you to continue to feel good, so I need to reschedule you to see the doctor so he can check you."

**Situation:** Patient says she is too busy to take time to come into the office this week. She'll give you a call when things calm down a little bit and the kids are back in school.

**Script:** "I'm sure the doctor will want to call to discuss this with you. Will you be available around noon?"

**Considerations:** Many times the suggestion that the doctor will be calling is enough to get the patient to come in. Sometimes, the patient is testing us to see if we believe in the program of care as much as we profess. They committed to follow through, but now they are hesitating. They need us to become "moms" and remind them of their responsibility to their health. If we are firm, they will get back on

track. Notify the doctor if anyone appears to be "wishy-washy" about their care.

Situation: Patient says she missed her appointment because she had a splitting headache and can't think about anything else.

Script: "Now is when you need to get in here! We'll be glad to make special arrangements to have a room available for you when you arrive, so you don't have to wait in the reception area."

Considerations: There will be times when you need to make special arrangements for patients who don't feel well or can't get a ride to your office. These appointments should be written in the appointment book in orange to alert you to keep a room open and waiting. Sometimes a house call may be in order. Go the extra mile!

If your first telephone call doesn't result in a new appointment being scheduled, you need to have a system for following up. I recommend the use of "care-call" slips. These are slips of paper that are used to record all attempts to contact the patient, and the results of those attempts. Record the dates and times of your calls and whether there was no answer or a message left (don't forget HIPAA), the date that a new appointment was scheduled, and any other comments that are important for the doctor to know.

The care-call slips are placed in a tickler file (a 3 x 5 index card box with numbered and monthly dividers works well) located by the telephone at the front desk near the schedule. Two attempts to reach the patient by phone should be made at various times of the day on two different days. Do not leave more than two messages unless it is an exceptional situation. Some patients perceive additional phone calls as harassment. After two attempts, if you are unable to reach the patient in person, the slip should be given to the doctor, who can then recommend what further action should be taken. Here are a few options:

Release the patient from care and send a release letter. Remember that it is important to end the cycle with patients and avoid a potential abandonment lawsuit. Attach the care-call slip to your copy of the letter to the patient and place it in their file.

Schedule a new appointment and send a "We missed you" postcard, scheduling a new appointment. Remember to write the new appointment in brown in the schedule. Place the original slip on the patient's treatment card and give the slip to the doctor for further instruction if the patient doesn't keep this new appointment.

If the doctor indicates that another call should be attempted on a future date and indicates the date they would like you to call again, place the care-call slip in the tickler file in the section for the date the doctor has indicated.

If no follow-up is required at this time, place the care-call slip in the patient's folder. The cycle is ended. All completed care-call slips are kept in the patient's file. This is documentation of noncompliance. If you wake up at 3 o' clock in the morning two months from now, wondering what happened to the patient you told you wanted to see again seven weeks ago, you can simply look at the slip in their file to remind you of the actions that were taken. Use of these personalized slips makes it faster to establish the status of a patient than using a log where all patients are listed together and you have to go through page after page of notes trying to determine what happened to the patient.

There are a variety of reasons why patients miss appointments, but when we use scripts and systems, we should be able to accomplish our goal: getting the patient back in the office and back on the road to good health. If you would like a sample care call slip, e-mail your request to [lisa\\_bilodeau@hotmail.com](mailto:lisa_bilodeau@hotmail.com) with "Care Call" in the subject line.

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