



OMG! Academy: The
Foundations
Recall -
Keep 'em Coming Back
Action Guide

Congratulations! You have purchased our Recall – Keep 'em Coming Back Module and are now ready to dive into some great information. Here in our Recall course we will be creating a sensational recall system. We will have you keeping that hygiene schedule full and feeding the doctors' schedules with restorative procedures.

Ready, set, go!

This Module is comprised of 3 Parts:

- Part 1: Pre-appointing the hygiene appointment
- Part 2: Handling Appointment reminders
- Part 3: Following up with overdue patients
- Part 4: Tracking Outstanding Claims
- Part 5: No Drama Mama

After completing this Module, you will have...

- ✓ The verbiage needed to pre-appoint patients for their next hygiene visit
- ✓ The importance of a proper appointment reminder system for your practice
- ✓ An understanding of what is needed to create a protocol for proper follow-up with those patients that are falling through the cracks in your practice and not being recalled on a consistent basis
- ✓ An easy to follow system for keeping the hygiene schedule full
- ✓ A greater sense of confidence in your ability to manage the insurance system in your practice

One of the many concerns in a dental practice today is having an effective recall system. Every office has a different recall system and all practice management

software handles recall a bit differently. Any system is only as good as the person responsible for its accomplishments and the success of the practice. That person must monitor it constantly and consistently for the system to be effective.

Recall is the heartbeat of the practice. You've probably heard this, but do you believe it? When reviewing a practice's production numbers, you should see that about 2/3 of that production is coming from the restorative operatories completed by the dentist. However, you must consider that to have a full schedule of doctor patients we have to have a full schedule of hygiene patients. This is where our restorative patients are coming from on a daily basis. The hygiene schedule is fundamentally feeding the doctor's schedule.



Part 1 Pre-appointing the Hygiene Appointment

An active pre-appointing system is far more productive and creates a superior recall system that will improve the efficiency of any dental office. Practices that are committed to pre-appointing in the correct manner will swear by the benefits.

Good organization is key. You must have the following in place for a pre-appointing system to be effective:



■ Excellent verbal skills to schedule the next appointment

The following verbiage is successful in most cases when pre-appointing a patient for their next visit:

"Mrs. Smith, you are due next professional cleaning appointment will be in May. I can do another Monday then at the same time or does Tuesday work better?"

This conversation keeps the hygienist or admin team in control of the conversation instead of opening it up to a "No" response.

You want to create an image for the patient that you are doing them a favor by getting them on the schedule at the best time for them. This does require advanced verbal skills, a pleasant personality, and a genuine desire to make everyone happy.

■ Creating a sense of importance for the preventative appointment

There is a common misconception among the public that the prophylaxis appointment is “just a cleaning”. Unfortunately, this misconception has been created by dental practices everywhere. We need to redirect that idea and impress on our patients that this appointment is vital to their oral health.

- Proper reminder system for those pre-scheduled appointments



Part 2 Handling Appointment Reminders

There are many different options when it comes to appointment reminders. You should choose what works best for the patients in your practice.

Let's discuss the options available:

- **Phone call confirmations**—this is the old tried and true way to remind our patients of their dental appointment.
 - Advantages:
 1. When you speak to a patient you get a true confirmation of the appointment
 2. If the patient needs to change their appointment you have them on the phone and can accomplish that at the time
 - Disadvantages:
 1. It is a time-consuming process
 2. Many times, it is difficult to get anyone to answer the phone these days and we have to leave a message
 - Verbiage for the confirmation call should sound as follows:

“Hello Mrs. Smith. This is Jackie from Dr. Molar's office. I have you scheduled on Monday at 9am. We look forward to seeing you then.”

If a message is required:

“Hello Mrs. Smith. This is Jackie from Dr. Molar's office. I am calling about your appointment on Monday. Please give our office a call at 123-456-7890.”

- **Electronic appointment reminders**—this system is a bit newer and many offices are still trying to work out the kinks in their office.
 - Advantages:
 1. Patients are utilizing email and text messages more than they are answering their phones these days

2. It is most often automated. Once you set it up there is not much thought process behind it
- Disadvantages:
 1. It is costlier than making phone calls (in the long run it is not because you are paying someone to make those calls you just see the money come out of your account in a different way)
 2. Some patients like the personal touch of a phone call
 3. Some electronic reminder systems are a little clunky and it takes time to get them set up the way you would like



Part 3 Following up with Overdue Patients

There are always going to be cases of patients that do not schedule their next appointment, have cancelled it or did not show up for the appointment. If you do not have one already it is time to start setting up a recall communication schedule to contact patients who haven't been reappointed. Regular follow-up with your patients can bring them back.

Set up a protocol like this one that will work for your office:

Recall Protocol

Recall Schedule:

1st of the month

- Call patients 3 months past due

2nd week of the month

- Call patients 6 and 9 months past due

15th of the month

- Cards are sent for patients due the next month
- Cards sent to patients past due 3 months

25th of the month

Call patients that are due next month

Using a systematic approach to communicate with your patient will ensure that you don't miss anyone in the process.

The following is a monitor for documenting the number of calls made by the team members in the

practice. This is a great way to create a sense of accountability.

Recall	Amount
Total Calls made	
# of messages left	
# of appts. scheduled	
# of cancellations	
# of rescheduled	
Open time in hygiene (min)	

When making the calls the following is an example of verbiage we have found to work well with our offices:

Patient answers:

"Hello Mr. Smith. This is Jackie from Dr. Molar's office. Dr. Molar asked me to give you a call because you are due to get your teeth cleaned. I have an opening on DATE at TIME. Does that work for you?"

Leaving a message:

"This is Jackie from Dr. Molar's office. Please give our office a call at 123-456-7890 regarding your appointment."

Keep your practice humming by focusing on returning patients and hygiene appointments, not just operatory procedures. Paying attention to recall is a win-win—your schedule will stay full, and everyone in your office will be happy.





Part 4 Tracking Outstanding Claims

Track outstanding claims on a weekly basis. We often see Insurance Aging reports that have several pages – the most we've seen is 58 but have heard of reports with hundreds of pages. This is a system that needs to be worked often and with purpose. The longer the report, the more overwhelming it is to get a handle on it.

Our advice – run an Insurance Aging report every Thursday and work it weekly.

Clearing houses will usually send a status report following the submission of claims. These reports have valuable information on them so take a minute to look them over each day. Words like 'unprocessed', 'holding', 'zero pay' or 'rejected' should get your attention. You can do the research and find out why the claim is not being processed to your satisfaction. By waiting until the Explanation of Benefits (EOB) comes in the mail, you are typically 30 days into the life of the claim.

The insurance websites are also a great source of information for tracking outstanding claims. Sites like Metlife give you all of the details and although other sites are not as user friendly, they all have valuable information.

How is the insurance aging system in your office?

Is it non-existent except when you inquire about outstanding claims?

Is it a chore that tears the flow of the office apart when it's "that time of the month"?

Appeal – appeal – APPEAL!

If a procedure is denied that you feel should be paid, send it back for reprocessing; this includes crown build-ups that 'are part of the crown prep procedure'. Explain why you are appealing it through a more detailed narrative. Your Dr. or hygienist can help with these details.

Statistics show that 85% of all denied procedures are not appealed. Of the 15% that are appealed, 75% are reprocessed with a payment. The odds are in your favor.

Insurance companies are not fun to deal with but they have become the norm in most dental practices. Learning to work with them so that your money is collected quickly is imperative. Don't let your money remain on their side of the fence any longer than it needs to be. Have good, consistent insurance systems in place and your collections will remain in line with your production.



Part 5 No Drama, Mama



Is there a virus infecting your office; something that is causing negativity, drama or a hostile environment? The effects of a bad employee can act just the same as a virus. Someone with a bad attitude can affect the whole team. Negativity, whether it is toward the doctor, their duties, other team members, whatever their issue may be...can affect everyone else around them.

There are many reasons why an employee does not get along with the other team members.

The most common we find are:

- Personality conflicts
- Jealousy or constant comparison to what others have;
- It could be there has been some time of conflict in the past.
- There are that just do not like their job; maybe they feel it is beneath them or they could do better
- Possibly feel in over their head – unable to complete the work
- Then there are those that just love drama

What are some reasons you find that people will have a negative attitude?

How do you handle negativity in your practice?

What could you do to change the negativity in your practice?

Your OMG! Academy Coaches

We are pleased to introduce to you the GTS coaches that will be presenting the courses to you.



Janice Janssen, RDH, CFE – Senior Consultant
janice@gtsgurus.com

When it comes to working at a dental practice, **Janice Janssen** has seen and done it all. Since her introduction into the field as a teen, she has worked as a dental hygienist and in other roles including office management, insurance billing, and collections. As co-founder of Global Team Solutions (GTS), Janice enjoys consulting because it allows her to share her techniques with the doctors, hygienists, and office staff who are on the front line every day. Her zeal for a proven successful periodontal program makes her a real asset to her clients across the country. She is the current treasurer of the Academy of

Dental Management Consultants (ADMC), and is a Certified Fraud Examiner (CFE), which positions her as an expert dental practice fraud and embezzlement.

Denise Ciardello - Senior Consultant
denise@gtsgurus.com

Denise Ciardello always knew she wanted to be an entrepreneur. And today she is co-founder of Global Team Solutions (GTS), a practice management-consulting firm. She is also a professional speaker and published author who brings experience, insight, and creativity into her consulting, along with a sense of humor. Denise's industry distinctions include serving as president of the Academy of Dental Management Consultants and membership in the National Speakers Association, Toastmasters International, and Directory of Dental Speakers.



Christopher Ciardello - Consultant
chris@gtsgurus.com

As a practice management consultant with Global Team Solutions, **Chris Ciardello** is passionate about sharing his expertise in the areas of technology and marketing as it pertains to the dental office. Chris has a distinctive knack for understanding the needs of an office and he communicates those needs to the team, which creates a cohesive, productive atmosphere. He began his career in dentistry as an office manager after graduating from the University of Texas, San Antonio with a BA in marketing. Chris is a member of the Academy of Dental Management Consultants.