Hygiene Recall

I just received a call from a front desk team member working in the office of a long-term client. She wanted to know how to improve her recall for hygiene. They were using Eagle Soft, and the doctor wanted to know what reports to use, and if they could improve their recall strategy. This front desk person has worked in the practice 2 years and was following the directions of the previous person who occupied her position. They were pre-booking 90% of their hygiene patients and then using the computer to generate recall cards at the due date, and if the patient failed to show, they would send another card at 1, 2, 3, and finally 12 months. Guess what: Very efficient but terribly ineffective. They were doing everything wrong for the right reasons. They had a strategy, but it just was not working. At this time in dentistry we can ill afford to spend time and energy doing things that do not yield the results we want. They were doing what they always did. We have to go to a results based strategy. If we can get the result that we want, then we are operating with the correct strategy.

Let’s start from the beginning. She asked: “What reports should we run?” Answer: Only the ones you use. Don’t assume that just because your computer is capable of rearranging numbers into countless reports that you should print or try to use them. Always begin with the end in mind. What are you going to do with the report? You may find that a computer might not be the most effective strategy. Maybe in this case we need a little old school combined with advanced technology.

Let me give you the answer by the numbers:

1. Pre-book at least 90% of your recall patients. It is best to do this chair side if you have computers in the operatory. Who best to re-schedule the patient than the person who just worked on them? It may take a longer or shorter amount of time for the next appointment (example: number of x-rays taken today versus number needed next visit). This eliminates one hand off when dealing with the patient and therefore will eliminate one possible error.

2. Only pre-book 70% of any day in the future. We need that 30% of open appointments for new patients and follow up treatment like soft tissue appointments. Nothing is worse than working with a patient to understand a soft tissue problem, and have them accept treatment recommendations, only to find that you cannot see them for 4 weeks. You tie urgency to the treatment and now you cannot get them in quickly. Boom: Cancellations and No-Shows sky rocket. Another reason revolves around marketing for new patients. You spend all that money and they call to make an appointment and you do not have a place to put them for 3 weeks. More CA/NS. We cannot be productive in hygiene by just having 8 recall patients per day. We need room for substantial cases like quadrants of sealants, soft tissue management cases, and impressions for TAP and snore guard appliances.

3. Understand “peak demand times”. Capacity is being able to deliver a service when the patient wants to have it delivered. Any front desk person can tell you that patients want to come in early or late. About 7-10 AM and 3-6 PM. We call these peak demand times. Those are every day
during the week, Monday-Friday (NOT just Monday-Thursday from 8 to 5). You can also add all day Saturday to the list of peak demand times. Monday, Friday, and Saturday are your best days. No one wants to start the week with a toothache or go thru a weekend with one. Everyone wants to come in on Saturday, so they won’t have to take off from work and expose themselves to the risk of another layoff. This is “consumerism”. With this in mind, when we pre-book our patients of record, we should try to encourage them to take non-peak demand times. These patients already love and respect you. The new patients do not have this trust or bond to the practice. If you use marketing to attract new patients, you must have peak demand times open. No peak demand times, no marketing.

4. **Use the Hygiene Fitness Report to create more value to the hygiene appointment.** It is not just a cleaning. This form, developed by hygiene consultant Annette Ashley Linder, goes a long way to helping patients understand what is done during the appointment. It is included below for your use. Keep in mind that we are not keeping this in our records. It is given to the patient to take home in order to create a better understanding and appreciation for the value of the hygiene appointment. The goal is for the patient to understand and believe that this IS NOT “just a cleaning”. A sample of the Hygiene Fitness Report can be found by following this link: [http://www.esummitmanagement.com/newsletter/Hyg_Fitness_Report.pdf](http://www.esummitmanagement.com/newsletter/Hyg_Fitness_Report.pdf)

5. **Have the patient address their own hygiene recall card in the operatory while waiting for the doctor to check.** Everyone opens their mail over the trash can. When they see their own handwriting they are sure to stop and look very closely. It grabs their attention. At least it will be read.

6. **Use oversize cards for recall.** The larger the better: Less chance of being misplaced or slipping into a magazine or other mail at the post office.

7. **Address correction requested.** This should be printed under where the postage goes on any mail used to contact your patients. This will insure that if the patient has moved and forwarding mail has expired, they will return the card or letter with the correct address. How stupid is it to keep sending correspondence to someone who does not reply if you don’t know if it is even reaching them. This assures you have an updated patient address. If they have moved a considerable distance from your practice, stop sending the cards. If you have the incorrect address, change it.

8. **Have the hygienist write a personal note to the patient on the recall card at today’s appointment.** Six months later they receive the card and can’t believe that the hygienist actually remembered about their niece and cheerleading. See, they think the note was added two days before the mailing. This will go a long way in eliminating CA/NS.

9. **In the above example: Go ahead and let the computer generate oversized post cards for month 1-3.** You still need to have the address correction requested on the card. You can use a good quality, self-inking
rubber stamp if you need to. Or apply a small label or sticker. Just be sure it looks good.

10. **If they have failed to respond to the recall cards, you will need to craft a reactivation letter.** The letter should be in an envelope with only your return address on it, and address correction requested (not your practice name). It should be hand written (they will open this before a typed letter address). The letter should be crafted to reactivate a lost patient. I would include an offer that would be impossible to ignore. Something like a cleaning, x-rays, exam, and consultation for $50-$60. You need to tell them that you know what a financial challenge the economy has been, how difficult it is to stay on budget, and just outline that it has been _________ months since their last cleaning and at that time they needed ______________. You need to mention about how much worse putting off treatment can be, and close with the offer. Sign the letter and place a PS that says something about: “If you still feel like you cannot budget you dental care, at least come in and let us take a couple of x-rays and do an exam for $1 so you don’t risk the unpleasant surprise of a costly and painful emergency”. The only other thing you can do to make the letter get opened is to make it lumpy. I once put a peppermint in the letter and started off by saying “Here’s a sweet deal”. We need to be very proactive about getting these patients back in the fold.

11. **Tie urgency to any treatment and do a great handoff to the next staff member.** Whether it is hygiene or doctor treatment, we need to perfect a script that ties urgency and importance to the recommended treatment plan.

Always keep in mind: You can’t get better giving patients what they do not want. If you are not growing (increased CA/NS, decreased new patients, Doctor and Hygiene production down) you are not inspiring your patients. Your systems will ultimately determine the number and variety of patients you will be able to inspire. Nothing is sacred when it comes to systems. Everything needs to change and keep up with current conditions. Make changes to get the results you want.

If you have any questions about hygiene or any other system give us a call and let us help you have your best year ever. (MA)