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# Break the bottleneck: Use electronic scheduling to boost efficiency



DR. LARRY EMMOTT

Get yourself out of dentistry's dark ages. Let a computer do your scheduling to bring tangible benefits to you, your staff, your patients, and the practice's bottom line.

By Dr. Larry Emmott

**M**any years ago—in the last century BC (Before Computers)—I had an experience that changed my professional life. I went to a scheduling seminar led by Jennifer de St. Georges, a dental practice management educator, and learned what I have come to call “productivity scheduling.”

Before the seminar, I (and most dentists) scheduled by procedure. We just put down a list of patient names and procedures. We had random overlaps of patients and, in an attempt to increase productivity, we double- or triple-booked.

Productivity scheduling differs from procedure scheduling in several ways. It starts with “ideal day” planning, a reference to how the doctor and the assistants ideally would like to schedule their time each working day of the year to be most productive. It involves pre-blocking each day with procedures a dentist would want to do at each segment of the day. For example, a doctor might schedule the highest-dollar procedures, such as crown or bridge preps, cosmetic bonding, or veneers prep in the

morning, filings next, and adjustments last.

In addition, with productivity scheduling, there is no double booking. There might be overlaps, but they are planned based on actual doctor time. Jennifer de St. Georges isn't the only one to teach productivity scheduling, of course. She was the first one, though, to explain the process to me in a way that I actually could apply. Her program worked great then, and it still works well today.

Eventually, I decided to start using a computer to schedule. To do so, I needed much more than a simple list of names. I needed a software program that could support the sophisticated productivity scheduling system I was using. On the other hand, the manual or book system we were using was OK, too. So, why change to a computer scheduler?

## Paper scheduling's disadvantage: bottlenecks

The main disadvantage of scheduling on paper is that it creates bottlenecks. For example, at the time when we were still using paper scheduling, we had two dentists and three hygienists. We had five books—one for each of us. You couldn't even see the front desk with our scheduling books piled up on it. Further, each book could only be in one place at one time, and only one person could use it at a time. As a result, a bottleneck would be created.

**Manual scheduling scenario.** Here's a typical scenario:

1. A dental patient is checking out and trying to make another appointment.
2. A hygiene patient is waiting to make an appointment for her next cleaning and some new fillings.
3. A new patient is waiting on the phone to book for an examination.
4. A regular patient is on hold. She wants to know when she is scheduled next and when her kids are due for a check-up.
5. And finally, a chairside assistant is waiting with another patient to hand off that patient to the front desk staff to schedule some comprehensive care.

With a paper book, these five patients are stuck waiting. Moreover, it is a sure bet that before all five patients can be helped, other patients will get in line.

Before long, everyone gets testy. For example:

- The comprehensive-care patient gets restless, as does the chairside assistant waiting to hand off that patient to the front desk. The assistant needs to get back to her room. The

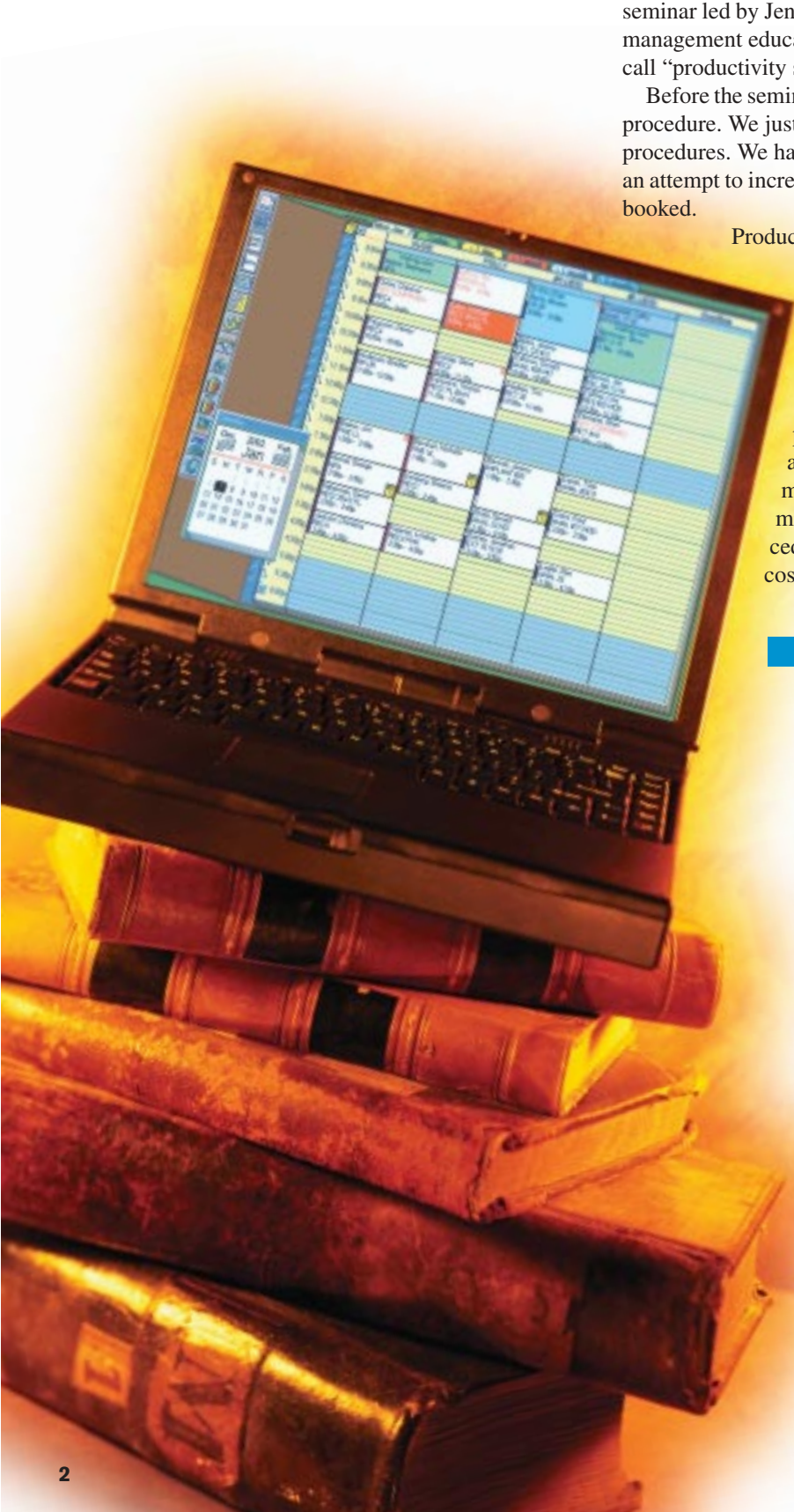
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## Building a high-tech office: A 10-article series

Dr. Emmott is presenting a series of 10 articles designed to guide a dental practice through the complex process of choosing and using high-tech systems. The articles are as follows:

- **Management software:** charting (February), scheduling (March), and finances (April)
- **Hardware in the operator** (May)
- **Digital photography** (June)
- **Q&A on building a digital practice** (July)
- **Digital marketing** (August)
- **High-tech diagnostic devices** (September)
- **Online consultations** (October)
- **Digital intraoral cameras** (November)

Scheduling software, this month's topic, is the second element required in building a high-tech office and is also part of a three-part segment on practice management software. The first article (February issue) explained the benefits of computerizing patients' dental records and charts. The third article (April issue) will include tips on computerizing financial records.



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comprehensive-care patient finally leaves, promising to call the office later.

- The new patient on hold seeking an examination gives up and later will call some other dentist in another practice.
- The hygiene patient stares at her watch and just waits.

The manual scheduling book is the bottleneck. Every patient must go through that paper book, which costs the practice money in lost productivity and patient goodwill.

**Electronic scheduling: benefits**  
Electronic software will eliminate such

bottlenecks, and it has many other advantages as well. Here's a look at its benefits:

**No more bottlenecks.** Once the schedule is electronic, it can be accessed from anywhere there is a computer. It can be accessed from the front desk or from the treatment room. The schedule even can be

accessed from a different building.

**Electronic-scheduling scenario.** Once we had an electronic schedule with computers throughout the office, we could handle our five patients easily and smoothly. Here's the manual scheduling scenario mentioned earlier, but handled here using computer scheduling:

1. The dental patient is checking out and making an appointment, but that patient is doing it with the chairside assis-

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### Features to look for in scheduling software

Here are some questions to ask and features to look for when buying scheduling software.

**Is it completely integrated? Do I have to re-enter basic data?** The most critical feature of scheduling software is that it must be integrated with the rest of your office management system. Integration means that each item, such as a patient's name or a procedure, is entered one time, and then the item transfers to wherever else it is needed electronically; this process is called single entry. Once entered, the item is "integrated" into all of the various electronic patient records.

As part of this integration, scheduling software must be able to check a patient's information for needed phone numbers. It must be able to access a patient's charts for treatment plans. The software needs to be able to find and display health warnings and more.

If the software has complete integration, any critical information you enter elsewhere in the system will travel electronically to the appointment book with your single entry. If you have to re-enter some information, such as the treatment to be done, the fee, or the time units needed to complete treatment, then your program is not integrated.

**Does it support productivity scheduling?**

The second feature of scheduling software is its ability to support productivity scheduling. This means you can schedule by doctor, by room, as well as by procedure. It means you can designate time units as either doctor time, assistant time, or room (chair-side) time. It means the software will support "ideal day" planning and allow you to create an ideal day productivity template to maximize efficiency.

**Does it provide fail-safes that prevent scheduling mishaps?**

The software also should be able to provide fail-safes. These are warnings that help prevent scheduling mistakes. For example, if you try and book the doctor on his/her day off, the software will ask

tant in the dental treatment room.

2. The hygiene patient is scheduling her cleaning and fillings with the hygienist in the hygiene treatment room.

3. The new patient, waiting to book an examination, is talking to a new patient coordinator. The coordinator is at home telecommuting.

4. The patient asking about appointments for herself and her children is talking to the front desk staff.



you if you really want to do that. The software also should be able to guard against errors such as triple booking, putting the wrong procedures in an ideal day template, or scheduling a patient twice for the same procedure.

**Does it create lists automatically?** Software should be able to easily or automatically create appointment lists, including ASAP, Broken Appointment, or Tickler lists.

#### A TIP FROM JENNIFER DE ST. GEORGES

Here's a tip on selecting an electronic scheduler from Jennifer de St. Georges, who has been lecturing on practice management for some 30 years and whose many programs include tips on scheduling and productivity.

- First, make a list of a half dozen or so practice management software companies.
- Then, take a close look at each of the programs on your list. As you're checking out the software, look at the scheduler first because it is a difficult part of a program to write well due to the complexities of effective dental scheduling.
- Finally, go back and check out the software programs a second time, comparing the schedulers and other features you've already seen.

**Note:** Jennifer de St. Georges, founder of JDsg International Inc., based in the San Francisco area, can be reached at 800-366-7004 or by e-mail at: info@jdsg.com.

5. And, finally, the comprehensive-care patient is in the treatment room making appointments with the help of both the assistant and the dentist.

**Rapid access to information.** A second benefit of electronic scheduling is the digital information that accumulates almost

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as a byproduct of using a computer system. Once any piece of information is stored as part of a computer record, it can be retrieved and related to just about any other piece of information.

For example, it is common for a patient to call up and say, "I can't remember when

my next appointment is. Can you look it up for me?" Often, patients can't remember what day or week they are booked or even whether they are seeing the dentist or the hygienist.

With a paper book, a staff member *politely* puts the patient inquiring about a next appointment on hold. Then, the staff

member must wade through columns of handwritten entries in the doctor's book and then, if needed, in the hygienist's book. If the office has more than one hygienist or multiple doctors, the work is easily doubled. When the entry is finally found, the patient says, "What about my husband? When is he coming in?" This

starts the manual search process all over again.

With an electronic book, the scheduling process works this way:

"I can't remember when my next appointment is. Can you look it up for me?" a patient asks.

*Click.*

"Here it is Sally. You're scheduled for Wednesday at 2:30 p.m.," the assistant says.

"What about my husband when is he coming in?" the patient asks.

*Click.*

"He doesn't have an appointment. It looks like his last cleaning was in 1989," the assistant says. "Would you like to make an appointment for him? And by the way, your children haven't had those sealants done yet. Let's get them scheduled as well."

In other words, the rapid access to information helps you answer patient questions fast and lets you serve patients better by helping them to get the care they need.

There are many other types of scheduling information that you can tap into electronically. For example, you can see instantly how much dentistry is scheduled for each day. You can search forward to the next opening. Finally, you can track important lists, which will generate income (see below).

### **Listkeeping made easy with computerized schedulers**

There are three types of lists you may want to track on electronic files: ASAP, Broken Appointment, and Tickler lists.

**ASAP list.** This is a list of patients whom you have scheduled for treatment at the next available time, but who would like to come in sooner for treatment, if and when possible.

When another patient cancels at the last moment, the first place you check is the ASAP list. Patients on that list will be listed with their phone numbers.

Once you call the patient seeking an earlier appointment and confirm an opening for that patient due to a cancellation, the new appointment is instantly, electronically, and completely transferred to the new earlier time. You don't have to look for a separate paper list. There's no more erasing and rewriting.

**Broken Appointment list.** This is a list of patients who have canceled appointments without rescheduling them. The Broken Appointment list is the second place you look into when a patient cancels at the last moment.

Calling patients who have previously broken appointments will help you fill last-minute openings in the appointment book quickly, as these patients already have agreed upon a treatment plan. You're just calling to tell them of an opening.

The Broken Appointment list also can be used to reactivate patients.

**Tickler list.** This is a list of patients who say they want to start treatment at a specific time in the future. Examples:

"I'll do that this summer when school

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**“Once the schedule is electronic it can be accessed from anywhere: front desk, treatment room, another building, or at home.”**



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is out,” one patient says.

“I’m moving into a new apartment,” another patient says. “Once I’m settled in a couple of months, let’s get started.”

You note these future dates on the tickler list. Ticklers then will pop up automatically on specific dates to remind you to call these patients and remind them that it’s time to schedule a treatment date.

Of course, all of this bonus information and list tracking can be done manually on paper. However, it takes much longer to track lists when done by hand. The manual process also is labor intensive—therefore expensive—and, in a busy office, intense list-tracking just never gets done.

In contrast, the benefits of using an electronic scheduler are tremendous. To do it well, though, you have to invest in software (see the sidebar, “Features to look for in scheduling software” on page xx).

Appointment scheduling is a critical function in a dental office. Using a paper book to keep the schedule is fraught with problems. New electronic scheduling programs will eliminate most of the problems and enhance how we relate to patients in many ways.

In 1990 BC (Before Computers), productivity scheduling was a great idea. Now, we can take that idea and make it even better with a computer, for the future is coming and it will be amazing! **DPR**

***Dr. Larry Emmott**, a recognized authority on dental technology in America, is a practicing general dentist in Phoenix. He also is a professional speaker, a featured instructor at the Las Vegas Institute, and a member of the American Academy of Dental Practice Administration. He has written hundreds of articles on dentistry, computer use, and management. He also writes a monthly electronic newsletter, “Emmott on Technology.”*

**Technology on the Rocks.** *Dr. Emmott offers hands-on technology seminars. His next seminar, “Technology on the Rocks” (June 1–5), is a five-day educational/recreational program to be held in Sedona, Ariz., and run by Dr. Emmott and Dr. Dale Miles, another dental technology expert. For details, call Dr. Emmott at 602-279-1641 or visit his Web site: [www.drlarryemmott.com](http://www.drlarryemmott.com); or call Dr. Miles at 480-816-6078 or visit his Web site: [www.learnrdigital.net](http://www.learnrdigital.net).*

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