SPEAR®

Just-in-Time Resource: Patient Retention

No-Shows and Cancellations

A Just-in-Time Resource is a dashboard-driven directive that is designed to produce an immediate impact on a specific opportunity within the practice.

Why is this needed?

A high number of no-shows and cancellations creates a lot of stress for the doctor and the team. It effects the schedule, efficiency, productivity, and customer service. Immediate actions to proactively address cancellations, with clear guidelines, scripts, and protocols, can reduce stress and increase team morale. Once there is an immediate reduction in cancellations, it is important to dive deeper into the foundational aspects of building value before, during, and after the appointment to create lasting results with patients that are committed to their care.

When is it needed?

- An audit of your My Day (**four** weeks back and current) indicates a significant number of cancellations (hygiene and/or doctor).
- Your Weekly/Monthly Reports show a long-term trend of no-shows and cancellations (the goal being to consistently see less than 5% of all appointed patients no-show or cancel in any given month).
- Your Re-Care Efficiency is below 70%.
- You are not hitting Production, Adjusted Production, or Collection goals over the months or years.

What is the strategy?

In your Leadership and/or Team Meeting with your Practice Growth Partner (PGP), complete the following using the Practice Solutions Analytics Dashboard:

1. Go to the dashboard and review the following along with your PGP and/or team: to gain alignment on your need for a collections focus.
   a. **Weekly/Monthly Reports:** Review prior reports highlighting the total number of no-shows and cancellations and gain alignment on the scope of the issue.
   b. **My Day:** Review up to **four** weeks of prior workdays and **two to three** days in advance and count the number of cancellations for both doctor(s) and hygienist(s).
   c. **Discussion Questions:**
      i. Are the cancellations occurring more in hygiene or doctor schedule?
      ii. Are we seeing more cancellations with new or existing patients?
      iii. Are most cancellations occurring within 24–48 hours or more before the appointment time?
      iv. Are most of the no-shows or cancellations getting rescheduled within 24–48 hours or more after the original appointment time?
      v. What are the dominant reasons given for the cancellations?

2. As a team, review and complete the *No-Shows and Cancellations Worksheet*.
   a. **Team Activity 1: Immediate Action Checklist (pp. 1-2)** will help you focus on specific opportunities for immediate change. Once completed, discuss, and choose two opportunities that will address your current needs and create a plan of action for implementation.
   b. **Team Activity 2: Script for Cancellation Guidelines (p. 3)** will help you customize scripts for discussing your cancellation guidelines with patients in the moment (when they call to cancel).

SPEAR®

Action Plan

Use the *Just-in-Time* Action Plan worksheet to help keep you on track.

3. Using your chosen top **two** opportunities from the *No-Shows and Cancellations Worksheet*, have the team set a goal for the current month's number of patients who no-show or cancel that demonstrates progress.
    a. Add up the average number of patients seen by doctor and hygiene in any given month and calculate what 5% of patient cancellations and 10% of cancellations would look like.

    Hygiene Example:

    Average number of hygiene patients seen in a day = **7**
    Number of hygiene days in current month = **32**
    32 (Hygiene days) **x 7** (patients/day) = **224** (patients)
    5% no-show/cancellations = **11 patients** (.05 x 224 = 11.2)
    10% no-show/cancellations = **22 patients** (.10 x 224 = 22.4)

    Use the same formula for patients seen by doctor, as well.

4. Along with your PGP, review and discuss how to implement chosen opportunities immediately.

5. As a team, review My Day daily to analyze progress on no-shows and cancellations.

6. At the next Leadership Meeting, Team Meetings, and huddles, review the dashboard and most current Weekly/Monthly report to analyze progress and celebrate success!

SPEAR®

Just-in-Time Resource: Patient Retention

No-Shows and Cancellations

In “Team Activity 1” below, answer each question by checking the box under your corresponding answer (“YES” or “NO”). Choose only one answer per question. Use the “Notes on Immediate Action” section to document your plan of action to address your current needs in that area. You can also use that section to answer open-ended questions.

Team Activity 1: Immediate Action Checklist

1. Does your website and phone message system clearly state that you cannot accept cancellations, and does it direct patients to call a “live” team member? Yes ☐ No ☐

   Notes on Immediate Action:

2. Is there a clear reason for return (RFR) in the chart that benefits the patient, enhances value and commitment, and is used in confirmation protocols? Yes ☐ No ☐

   Notes on Immediate Action:

3. Are our courtesy calls, texts, or emails designed to reinforce the patient’s commitment to the appointment being completed/sent at least 48 hours before the scheduled visit? Yes ☐ No ☐

   Notes on Immediate Action:

SPEAR®

4. Do we have a firm internal cancellation policy in place, and if so, is it followed? Yes ☐ No ☐
   a. Do we have a cancellation fee assessed (if so, how much and when)? Yes ☐ No ☐
   b. Are our cancellation guidelines clearly and effectively stated on our website and other written materials? Yes ☐ No ☐
   c. Is there a gradient level of reaction to a no-show/cancellation (e.g., first offense = warning, second offense = discussion of the cancellation fee, repeat offender = fee or termination from the practice)? Yes ☐ No ☐

Notes on Immediate Action:

5. Does our team feel comfortable sharing/enforcing cancellation guidelines? Yes ☐ No ☐

Notes on Immediate Action:

6. When a patient calls to cancel, is there an effective script in place that inspires the patient to keep the original appointment? Yes ☐ No ☐

Notes on Immediate Action:

SPEAR®

Team Activity 2: Scripts for Cancellation Guidelines

Review the example scripts below. Then, create your own scripts for discussing your cancellation guidelines with patients.

Patient Conversations
Example Script 1: Sharing/Enforcing Your Cancellation Guidelines

> *"Mrs. Jones, I am so sorry to hear about your last-minute need to cancel. It is part of our vision to keep strong control of patients' schedules so that everyone gets the attention and care they deserve. Normally, we charge a cancellation fee, but as it is the first time this has occurred and we were able to reschedule this important appointment, I'll be happy to waive that fee! I have made a note in your chart that I reviewed our guidelines should there ever be a need to discuss this in the future."*

Your Scripts:

Patient Conversations
Example Script 2: Inspire Patients to Keep Their Original Appointment

> *"Mrs. Jones, I am so sorry to hear that you would like to cancel your appointment on___. I pulled up your chart, and (doctor/hygienist) indicated this was a clinically essential appointment. Is there any way I can help you keep this important appointment, so we don't compromise your care?"*

Your Scripts:

IMPORTANT: Make copies of your customized scripts and place them in areas where they can easily be accessed by the scheduling/treatment coordinator or front desk team in the event that a patient calls to cancel.

For more information, contact us at 866.781.0072, or email us at info@speareducation.com

SPEAR®

Just-in-Time Action Plan

Use this Action Plan to outline the specific steps your practice is taking to implement the action items outlined in your Just-in-Time Resource.
Track your actions and follow up regularly with your Practice Growth Partner to report your progress.

What are the Action Items?	Who is Responsible?	When is the Completion Date?

For more information, contact us at **866.781.0072**, or email us at **info@speareducation.com**