

# FRONT OFFICE *Rocks*®

## The Leader in Dental Front Office Solutions & Training

### Patient Control Morning Schedule Review

It is important to take the time first thing in the morning to look at the schedule and determine if there is anything in the day that needs to be remedied, moved, handled, etc. Looking for and addressing these issues early in the day helps keep the office running smoothly and productively.

**YOUR WORDS:** What does it mean to look at the schedule from a “Bird’s Eye View”?

### Areas To Review In The Morning

**Emergencies** – in the morning, look for where are good spots for emergencies to go by determining when you will have a CHAIR AND A CLINICIAN available to see that emergency. Share that with your scheduling staff so they know when the emergency patient calls in to be seen.

**Amount Scheduled versus Production Goal** – you want to determine how likely are you to hit production goal and if there needs to be a lot more attention placed on today’s schedule to hit the goal or if it looks like you will achieve that goal if all your patients show up. Helps to determine where your energy needs to go with regards to filling the schedule more for today or more towards another day that needs some more production.

### What Should You Look At When Reviewing Appointments?

- Are the patients confirmed?
- Are financial arrangements worked out?
- Are the lab cases in?
- Do you have everything necessary to make sure that appointment can happen?

**Confirmations:** Your job is to help make sure that everyone arrives for their appointment the best of your ability, so by double checking if patients have been confirmed or just left messages – you can help your staff identify problem patients and direct them to do what is necessary to get that patient to arrive.

### Other Issues:

- Are the appointment time scheduled appropriate lengths?
- Do you have enough staff/clinicians for the day to run smoothly?
- Other areas of congestion you might be able to fix or rearrange now to help run smoothly?

**Delegate:** entrust (a task or responsibility) to another person, typically one who is less senior than oneself. "he delegates routine tasks"

### List Staff and Examples of Tasks You Could Delegate To Them Once You Review Schedule

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