

Failed and Cancelled Appointment Checklist for Open Dental

Establish the Importance of the Appointment	“Cleaning teeth is the single most important thing we do for our patients!”
Do this before any appointment is made!	Doctor believes this and says it to every new patient!
<u>Everyone!</u>	Staff always remind patients, “Remember, the doctor says clearing teeth is the single most important thing we do for our patients!”
Be sure money is not a hidden reason for failing an appointment	Written payment options for all treatment over \$400
	First payment is due when first appointment is scheduled, not at the first appointment
	Offer options that make treatment affordable: <ol style="list-style-type: none"> 1. Prepayment in full with discount 2. Payment during treatment 3. Extended payment plans through an outside agency with or without interest
Try to save the appointment!	“I have patients waiting for appointments with Jillian so it will be a while before I can get you back in.”
	<u>Always</u> say, “ Is there any way you can possibly make this appointment? ” – sometimes this works!
	“OK, I need to call some of our patients who are waiting so I can give them as much notice as possible. Let me call you back in the next day or so to try to reschedule your appointment.”
	Do NOT reschedule that appointment now! That's what the unscheduled list is for.
“Break” the appointment in the schedule	Right mouse click and “break appointment”
	Leave the broken appointment on the schedule so everyone in the office sees that additional time is now available in the schedule
	You can move the appointment into a difference column when you fill the open time
Try to fill the open time	Open the “fill my schedule” button in Open Dental and use the unscheduled, recall, unscheduled tx and asap lists
Enter notes	Date-stamp!
	Chart why patient missed appointment (“failed without notice,” “called to cancel 10 minutes before;” “car won’t start,” “called to cancel 30 minutes before appointment, had to take sick cat to vet.”
	Put your name or initials at end of note
Move the appointment to the unscheduled list	Right mouse click, send to unscheduled list

