



Scheduling Patients

Always start with something human and personal

- ⇒ How are you?
- ⇒ How is the family?
- ⇒ Learn a bit about how their life is going (**watch training video on human connection and proactive discussions)

Update them on the status of your practice

- ⇒ When you will be opening or what the status of your office opening is
- ⇒ Explain to them the protocol of how your office is seeing patients
- ⇒ Discuss precautions that your office is taking for safety

Discuss the appointment needed and their interest in scheduling

- ⇒ Remind them of the appointment they need to schedule and the importance of it
- ⇒ Listen to their response and if they are ready and want to schedule now or hesitant
- ⇒ Find out what their considerations are and ask more questions, if needed

Schedule now or later or the next follow up call

- ⇒ If the patient is ready to schedule now and you are confident they will show up for their appointment, schedule them as soon as it makes sense
- ⇒ If the patient is willing to schedule but not right away, then get them to schedule for a future date, letting them know you will communicate with them prior to that time to ensure they will be ok to arrive for that appointment
- ⇒ If the patient is not ready to schedule or you are not confident that they will make the appointment, then schedule an agreed upon time to follow up with them to get them to schedule in the future. Get their commitment that it is ok for you to contact them at that time with the intention to get them scheduled for an appointment then

For those who schedule, review the new procedures for checking in and checking out and make sure they understand.

Document the conversation with the patient in their chart and in the appointment note if they scheduled their appointment. Revisit the notes, as necessary, when talking to the patient going forward as their situation, just like the office's, may change and adapt over the upcoming days, weeks and months.