DESIGNATED ACCESS 5 WEEK SCHEDULING IMPLEMENTATION PLAN:

1. Pick a "Go Live" date, after which no more appointments will be scheduled in the traditional manner.
2. Instead, now for patients who need:
    - Non-emergent dental appointments:
        - If the schedule for the dentist is full beyond 5 weeks (25 clinic days) these patients will be given a card to schedule their next appointment. The card will say, "_____'s (write in the patient's name) next needed appointment will be for _____ (write in the procedure type for the next item on their treatment plan i.e.: filling, extraction, denture visit). Please call us to schedule this starting on _____ (write in next available date the schedule will open) to schedule this appointment."
        - Sample script when first implementing the new scheduling system and previously scheduled appointments are still scheduled out past 25 clinic days: "To better meet patient demand, our dental practice has moved to a new scheduling system that will create more access for our patients. To implement this new scheduling system, we are not booking patients beyond 5 weeks. Right now all of our available appointments are taken. The next available day will open up on (date the next day appointments will be available schedule). Please call us on that day to schedule this appointment."
        - Sample script once 5 Week Designated Open Access scheduling is active, meaning the following day the schedule for the day 25 clinic days later will open: "To better meet patient demand, our dental practice has moved to a new scheduling system that will create more access for our patients. To implement this new scheduling system, we are not booking patients beyond 5 weeks. Everyday a full schedule opens up 5 weeks later. The appointments get filled fast! So it's best to call first thing in the morning to get the most options for appointment times."
    - Appointments with the dental hygienist:
        - After their appointment with the hygienist these patients will be given a card to schedule their next appointment. It will say, "You are due for your next cleaning on _____ (write in date they are due). Please call us starting on _____ (space to write in date one month prior to their due date) to schedule this appointment."

Sample script: "To better meet patient demand, our dental practice has moved to a new scheduling system that will create more access for our patients. To implement this new scheduling system, we are only booking our schedule out for 5 weeks. This card lets you know when you are due for your next appointment and when to call us to schedule this appointment."

Example:

Consider September 7th is selected as the "Go Live" date for designated open access scheduling. During that day, the available appointments will be open for scheduling 5 weeks from that date (25 clinic days out). So on September 7th patients will be able to call to schedule appointments on October 12th.

September:

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5
6	7 *GO LIVE* Open schedule 25 clinic days out from this date/Oct 12	8 Open schedule for Oct 13	9 Open schedule for Oct 14	10 Open schedule for Oct 15	11 Open schedule for Oct 16	12
13	14 Open schedule for Oct 19	15 Open schedule for Oct 20	16 Open schedule for Oct 21	17 Open schedule for Oct 22	18 Open schedule for Oct 23	19
20	21 Open schedule for Oct 26	22 Open schedule for Oct. 27	23 Open schedule for Oct. 28	24 Open schedule for Oct. 29	25 Open schedule for Oct. 30	26
27	28 Open schedule for Nov 2	29 Open schedule for Nov 3	30 Open schedule for Nov 4			

October:

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1 Open schedule for Nov 5	2 Open schedule for Nov 6	3
4	5 Open schedule for Nov 9	6 Open schedule for Nov 10	7 Open schedule for Nov 11	8 Open schedule for Nov 12	9 Open schedule for Nov 13	10
11	12 Open schedule for Nov 16	13 Open schedule for Nov 17	14 Open schedule for Nov 18	15 Open schedule for Nov 19	16 Open schedule for Nov 20	17
18	19 Open schedule for Nov 23	20 Open schedule for Nov 24	21 Open schedule for Nov 25	22 Open schedule for Nov 26	23 Open schedule for Nov 27	24
25	26 Open schedule for Nov 30	27 Open schedule for Dec 1	28 Open schedule for Dec 2	29 Open schedule for Dec 3	30 Open schedule for Dec 4	31

Implementing 5 Week Scheduling Tips

Determine Capacity

The practice must be able to determine how many appointments can be seen each day. Capacity is determined by multiplying the total number of clinical provider hours (or the sum of all clinical hours worked by each provider) in the day by the national capacity benchmark for visits per hour.

For example:

Day of the Week	# of Dentists	Total # of Clinical Provider Hours	X 1.7 Visits/FTE/ Clinical Hour	Potential Visit Capacity
Monday	2	15 hours	1.7	26 visits
Tuesday	3	22.5 hours	1.7	38 visits
Wednesday	3	22.5 hours	1.7	38 visits
Thursday	4	30 hours	1.7	51 visits
Friday	1	7.5 hours	1.7	13 visits

*1.7 visits per hour is the national benchmark for visits per dentists in a community health dental practice. For determining visit capacity for hygienists it would be 1.2 visits per hour.

Utilize Designated Access Scheduling:

Once the practice determines how many appointment slots are available each day a strategic scheduling template can be created to foster predictability into the dental practice. The objective is to maximize clinic's revenue, while also maintaining timely access to care for patients.

Example:

Time	Operatory 1— DDS1	Operatory 2— DDS1	Operatory 3— RDH1	Operatory 4— RDH2
1:00	Emergency		Adult new	Adult new
1:30		Restorative		
2:00	Extraction		Child new	Child recall
2:30		Restorative		Child recall
3:00	Extraction		Recall child	Child Sealants
3:30		Restorative	Recall child	Child recall
4:00	Restorative		Child Sealants	Adult new

Utilize Designated Access Scheduling, Continued:

- Divide the annual dental clinic expenses by the number of clinic days in a year to find out how much revenue the practice needs to generate each day to reach sustainability. Use this information to develop daily revenue goals.
- Determine the expected revenue for each payer type/visit type. Understand what each visit represents in terms of revenue and treatment goals.
- Create a scheduling template based on revenue, access, and productivity goals.
- Designate slots in the template for emergencies based on the daily demand for emergency care at your dental clinic. These slots will remain blocked until 1-2 days prior to the day.
- Designate slots in the daily schedule template for priority populations such as pregnant women and children. (Focusing on prevention for children will reduce/eliminate their likelihood of developing dental disease and help them remain health as they become

adults. This helps to improve the overall health status of patients in the community. These patients also are covered by insurance and the practice will be reimbursed for the services provided, which helps to subsidize care provided to uninsured patients.)

- o Priority patient designated access slots should remain reserved until the week prior. At that point all reserved appointment blocks should be removed and any unscheduled time becomes open access for any patient who needs dental care.

Helpful Hints for Managing the Hygiene Schedule:

- Run recall reports from the dental practice management system of patients due for recall in the next month and send them reminder cards to call to schedule their appointment (eg, patients due for recall in November get a reminder card in October to call and schedule their appointment).
- Develop a recall system based on risk assessment. Patients who are at high risk and need to be seen should be priority and every effort should be made get them to continue care.
- Run reports of patients whose due dates have passed to make follow-up reminder calls to get them to schedule their hygiene appointment.

Educate Staff and Patients

Before implementing the 5 week scheduling system and designated access it is important to educate and train staff on the new system and why it is important for the dental practice to schedule appointments strategically. Supply staff with resources on how to implement and carry out the new scheduling system.

- Meet with providers and staff to explain the new scheduling system. It is important to gain buy-in from all staff and address any concerns they may have before implementation. They need to be prepared to effectively and appropriately use the new system and ready to explain the new system to patients.
- Provide staff with a template of the new scheduling system they can use as a guide to understand how to schedule appointments.
- Develop cheat sheets for staff that include what the clinical protocols are for each visit type, what the appointment lengths should be based on procedures and RVU's , what the reimbursements are for different payer types.
- Treatment plans must be consistently updated and prioritized so that when patients call to schedule their next appointment, the receptionist will easily be able to find out what type of appointment is needed and how much time is needed.
- Communication to patients should be consistent across all staff. Provide staff with a script that will assist them when communicating to patients about the scheduling system.

Sample Scripting:

"At this time, we have a very limited capacity to accept new patients because of a shortage of dental providers. We are working hard to hire more providers, but in the meantime, we are

limiting new patients primarily to children and pregnant women. Are you calling to schedule an appointment for a child or a pregnant woman?"

If yes: Proceed to schedule appointment.

If no say: "We only have a few openings each week for new adult patients. Right now, the next available new patient appointment is….."   OR

"Right now, all our available appointments are filled. But every day we open up a few more appointments. I suggest you keep calling us every week or so to see if we have been able to open up more appointments."