

Tracking Patients Who Do Not Accept Treatment

- Consultation Appointment
- Follow-up phone call (One week later).
- Post-consultation letter (Two weeks later).
- Second phone call (Two months later).

Steps Listed in Detail

Consultation Appointment Sets the Stage for Follow Up.

At the time of the consultation appointment, if the patient does not accept treatment:

- When you have questions, not if you have questions.
- Ask this question, “How do you think this treatment will benefit you?”
- Ask for permission to follow up: “Would it be o.k. if our treatment coordinator calls you to follow up”?

Follow-Up Phone Call Scripts.

If you call the patient and get an answering machine, leave a message with your number. If there is no response within one week, call again. If you get the machine a second time, leave another message. If there is no response after two messages, do not call again.

If staff is successful in speaking to the patient by phone, the script should be as follows:

Hello, Mrs. Smith. This is ____ from Dr. Smile’s office. I am calling like we promised. I know that Dr. Smile reviewed some treatment options with you when you were here. I am calling to follow up. What questions do you have that I may be able to answer for you?

Even if the staff has answered all questions, it is a good idea in some cases for the doctor to call the patient. (Note, this does not apply to questions about financial arrangements. Staff should answer these questions and the doctor should not need to call the patient to discuss finances.)

Mrs. Smith, I’m also going to ask Dr. Smile to speak to you personally to answer that question. He’s with a patient right now, but he could call you back at about ____ o’clock. Would that time be convenient for you?

When the doctor calls the patient, he or she will give the patient the same answer/information as the staff in order to reinforce the message. Then, the doctor finishes the phone call as follows:

[This is the doctor speaking.] *Do you have any other questions, Mrs. Smith?* (If there are no other questions, then the doctor continues as follows.) *When you were speaking to Marsha earlier today, did she schedule your treatment?* (The answer will be no.) *Would you like me to put her on the line now so you can schedule?*

Note that if the patient is definitely not interested, then there is no need for the doctor to call and there is no more follow up. If the patient is still interested but not ready to schedule, then ask for permission to call again.

It was a pleasure speaking with you, Mrs. Smith. Would it be o.k. if we followed up with you again at some point in the future?

If the patient says yes, then call again in two months.

SAMPLE POST CONSULTATION LETTER FOR IMPLANTS
Information in square brackets [like this] is customized.

Dear Mrs. Smith:

It was a pleasure to see you in my office recently regarding your dental implant treatment. [It was also a pleasure to meet your husband, Harvey.] Dental implants offer many benefits, such as:

- Natural appearance.
- Natural chewing function.
- Never develop decay.
- Never require root canals.
- Preserve bone to prevent the appearance of premature aging.
- Scientifically proven track record.

Dental implants are a scientific marvel that function much like natural teeth and enable patients to laugh, eat, chew, and smile with great confidence.

[You mentioned that your parents lost their teeth at an early age. I know from our conversation that you do not want to wear conventional dentures. Fortunately, there is now a much better alternative to tooth loss than old-fashioned dentures.]

Please call our office with any questions or to schedule the first phase of your treatment.

Sincerely,

John Smile, DDS