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Appointment Book Magic: Attracting and Scheduling New Patients

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According to CA trainer Sherry Hodge, most chiropractic offices do not utilize the appointment book to its potential. However, she also notes, "When used effectively, it can become the key to the success of a growing practice. Correct use not only enables time to be managed but can also be the key to patient control and follow-through. The quality of the care the patients receive can be determined by how they are scheduled and when they are scheduled."

In this article, we will look at how to use the appointment book to attract and keep new patients. Here are some suggestions:

1. Determine your "new patient" time. These times will not be when the majority of your established patients like to be seen. These times are usually in the mid-morning after the early-bird established patients; before lunch; and in the early afternoon, before the after-work rush. Every community has unique needs, so determine what yours are, and be willing to change with the seasons and economic situations.
2. Identify these time slots by putting red boxes around the predetermined times.
   - Nature will always fill a void. When you set aside time for new patients, and when you answer the phone, think "new patient" and be prepared to have them ready. Fill these special slots with new patients only. If you do not have a new patient scheduled (and I doubt you won't), you can always use this time to catch up on paperwork and to return phone calls.
   - Realize that these time slots are not at the most popular times for new patients. If the caller states that this time is inconvenient for them, let them know that the first visit(s) require extra time, and that after the initial visit(s), you will most likely be able to schedule them at times that will be more convenient.

- If the patient persists, ask, "Is this an emergency?" or "How long have you been in pain?" An emergency would be when the patient has been in pain for less than 48 hours. Have established emergency times in case it truly is an emergency. These times are usually during the lunch break or after work. Be sure to check with the doctor to be sure that he or she is available during these times. In other words, have all outside activities, such as club meetings and other activities, in the book.
- Explain that we have special times set aside so that the patient will have "quality uninterrupted time with the doctor."

3. Always list these items in the time slots so that you are prepared:
   - the spelling of the patient’s first and last name
   - their home phone number and work or cell phone numbers
   - who referred them to the office
   - what type of financial category - ask the patient, "Were you injured on the job or involved in any other type of accident?" Remember not to use technical terms such as workers’ compensation or personal injury - most people do not know what these are.
   - what time they were told to arrive
4. Always call and confirm new patients the night before.
5. When scheduling, remember that the time you tell the patient to arrive at your office is the time they have scheduled with you to complete the required paperwork. Also remember the time the patient is in the book is the time they will be seeing the doctor. For example, tell the patient that the appointment is at 9:45, but have them written in the appointment book at 10:00. This will give them at least 15 minutes to complete their paperwork before seeing the doctor.
   - Do **not** tell the patient, "Please come 15 minutes early to fill out paper work." When you do this, the patient usually show up at the time they are scheduled in the book to see the doctor, and this throws the whole schedule off.
   - If you have a "new patient advocate" (a CA who assists them with their first-visit paper work), make sure they are aware of when the patient will be arriving and that they have the "pre-made new patient file folder" with all the required forms ready before the patient arrives
6. The doctor should always call the patient after their first adjustment. Doing this will address any potential problems and show them how much we care. If there are any concerns, address them immediately. This may mean a repeat visit or even a house call. Go the extra mile! We don’t want people to say that they have tried chiropractic and it didn’t work when we could have done something

to remedy the situation.

- In your pre-made new patient packet, you should have a slip that is completed before the patient's first adjustment. This slip should have the patient's name, telephone number, and date and time of their first adjustment. The slip should be given to the doctor before the end of the day, and after the doctor calls the patient, he or she should write comments on it before it is returned to the front desk to be filed in the patient's file folder. If for any reason the doctor leaves before making this crucial phone call, the CA should phone the patient. If there are any concerns that need immediate attention, the doctor should be contacted immediately so they can be addresse

When the appointment book is used effectively, your practice will grow and there will be more time to see new patients. As Ms. Hodge states, "There must be a plan to maximize time utilization, and the appointment book is the plan."

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