



ORTHO2

# Reaching Out to Siblings

by **Natalie Beaton**

Orthodontic offices work very hard to increase the number of new patients that are seen but can overlook the potential orthodontics to be found in the sibling population of the practice.

Having a consistent and well planned follow up regarding each of these valuable family members can be a very good source of new patients. One of the benefits of targeting this group for follow up is that the families are already established as a part of your practice and are typically, very receptive to recommended treatment for the sibling(s).

Both Edge and ViewPoint make timely follow up with siblings very easy. Prior to starting this system, I would add a recall procedure called Recall: Sibling or something that would indicate an entirely separate group of recall patients that are all unscheduled siblings. I would also recommend creating a status called Sibling (SIB) so you can tell at a glance that follow up is not needed until that future date.

The next step is to add the sibling(s) to your system when the first child is seen for an initial new patient evaluation. A request for sibling name(s) and date(s) of birth can either be added to your registration form or requested by the Treatment Coordinator at the first visit. "I see that <patient> has a brother/sister(s). Thank you for giving me information about her/him/them. The American Association of Orthodontics recommends that all children be seen after their seventh birthday for an orthodontic evaluation. Dr. <Orthodontist> believes so strongly in offering this evaluation that he/she offers to see any siblings at no cost to you. I will follow up at that time to see if you are interested in scheduling a free evaluation for <sibling>." If time allows, collect sibling information for recall observation patients as well.

When the siblings are entered, it is important that they be added to the system as patients so that you can give them a future recall date. Currently if they are entered as a non-patient/sibling they can only be "found" by the system if you look them up by the child who is already a patient.

This makes follow up very time consuming. Once they are entered as patients, they should be placed on a recall date in the future for their seventh (or whatever age you want to initially see them) birthday using the Recall: Sibling procedure that you created.

For fast follow up with these patients, each month on the first, you would run the Recall date range report for the current month and select Recall: Sibling. This will give you a list of all patients who should be approached in the current month and that are siblings of an existing patient. The parents of each of these patients should receive a letter explaining the benefits of early orthodontic evaluation and inviting them to schedule an orthodontic evaluation for the sibling. An example of a letter can be found at the end of this article.

At the same time that the letter is sent, add a pop-up alert that asks you to check if the sibling got scheduled. This would pop up at the time of the next scheduled appointment for the child who is a patient. This allows the front desk staff to offer to schedule this appointment if the parents did not respond to the letter. "I noticed that <sibling> had a birthday recently and may benefit from an orthodontic evaluation. For your convenience, can I schedule that with <patient>'s next visit?" Offering to schedule them at the same time as the next appointment for the child who is already a patient is one way to increase the number of siblings that schedule. You may be able to schedule a slightly shorter exam as the family is already familiar with the office, if this seems appropriate for your practice.

There are parents who may state they are not interested in scheduling an evaluation for the sibling at this time. The scripting I would recommend would be-"I'll put a note on

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<sibling>'s account. Would you like us to follow up in a year or perhaps when <patient> finishes <her/his> treatment?" If they choose to be called in a year just change the recall date to reflect that change and put a note on the account. If they request a follow up when the child who is a patient finishes treatment, I would put them on recall for the estimated time of completion and put a note to check the status of that patient prior to re-approaching.

In summary the steps to setting up this system are:

1. Add sibling recall procedure and Sibling status to the Ortho2 system.
2. TC collects sibling information on all new patients and recall observation patients if time allows.
3. Add siblings to system and put on sibling recall for their seventh birthday.
4. Once a month designated staff member should run the report for siblings turning seven that month, send letter, and set up popup on their account for further follow up.
5. Verbally follow up at time of next appointment for existing patient (if needed).
6. Update recall date as needed to reflect when parent would like follow up.

This is not a difficult system to maintain and can have a very valuable impact on your practice production. In six easy steps you can consistently reach out to new patients whose parents are already invested in your practice.

## Example of Patient Letter

Dear <Responsible Party>:

We were reviewing our records and noticed that <Patient Nickname> is turning seven this month. The American Association of Orthodontics recommends an orthodontic evaluation anytime after the age of seven and we wanted to invite you to schedule this important evaluation for <Patient Nickname>. Dr. <Orthodontist> offers this at no cost to you. We would be happy to coordinate an appointment at some point when you are already coming in, for your convenience.

This initial orthodontic visit will give Dr <Orthodontist> the opportunity to discuss what orthodontic needs <Patient Nickname> might have, either now or in the future. In addition, early evaluation allows Dr <Orthodontist> to carefully time any needed orthodontics to take advantage of <Patient Nickname>'s specific growth and treatment needs.

We have enjoyed having your family as a part of our practice and look forward to the possibility of continuing that relationship with <Patient Nickname>. Please give our office a call and we will schedule for an initial orthodontic visit.

Please let <Patient Nickname> know that the entire team send their wishes for a very happy birthday!

Sincerely,

Scheduling Coordinator ☺

## About the Author



Natalie Beaton has more than 18 years of hands-on experience as a Treatment Coordinator and Financial Administrator. She works exclusively with Ortho 2 clients to maximize their use of the ViewPoint and Edge systems in all critical practice areas.