



How to Quit Blaming the Receptionist for a Faulty Schedule

by **Charlene White**

In meeting orthodontists and staff across the country, I find that the majority of offices that have complaints regarding their schedule normally blame the bulk of the problem on the receptionist.

The first thing I evaluate in a case of this type is whether or not the person filling that position has the qualifications that are essential for successfully assuming the responsibility of the front desk position.

Qualifications such as these:

- 1 Staying calm when the doctor comes in and says, "Oh, by the way, I've decided to take off two days next week. Could you please reschedule all of the patients?"
- 2 Having the ability to do five things at one time efficiently and effectively and keep a smile on their face.
- 3 Being able to magically create spaces in the appointment book when the clinical staff or doctor tells the patient, "We need to see you in one week for 45 minutes." The patient comes to the desk and relays this message while they blankly stare at the names they have already "squeezed in" that week.
- 4 Keeping their cool when they overhear the assistants or doctor say, "Who scheduled this mess?!"
- 5 Having the ability to sustain icy glares from the reception area when the doctor is on the telephone and the schedule is running 45 minutes behind!
- 6 Knowing how to tactfully tell the doctor that the banded patient didn't show up for their appointment.
- 7 Being able to keep from sliding under the desk when the doctor tells them that the urgency of Mrs. Jones's call was, "She needs to make an appointment. Pick up line two!"
- 8 Being assertive when a mother says, "I need to run a few errands while Johnny is being banded. You

wouldn't mind if I leave my little ones here would you? They are such good children!"

- 9 Remaining calm when you have just reappointed the "walk in" patient and spent 15 minutes explaining your policy of "calling before you come" and the doctor makes one of his/her rare appearances at the front desk and says, "What are you doing here Joe? Got a problem? Come on back. Sure we can take care of you today!"
- 10 Being able to fill an entire day (8:00 A.M. to 5:00 P.M.) even though 80% of the mothers say, "Susie can't miss school, cheerleading, piano, or dance. We must have an appointment after 3:30 P.M.!"

If you have ever sat in that chair at the front desk, you know what a hot seat it can be at times. The person or persons that run the desk are normally the victims of the blaming game, especially in the area of scheduling. The receptionist is not totally responsible for scheduling. It is actually a combination of factors that create a smooth flowing day. The following is an outline of how the entire team plays a role in taking responsibility for an effective schedule and less stressful day.

Doctor's Responsibility

It will greatly speed the flow of patients if the doctor decides what will be needed on the next appointment and makes a note of it in Treatment Chart. This prevents the doctor from having to sit down and reevaluate the case on the next appointment date.

Everyone's number one priority should be treating the patients in the chair. This includes the doctor. Many doctors make the mistake of making their personal telephone calls a top priority. Doctors and staff should not

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take personal calls unless it is absolutely necessary. It is not fair for doctors to expect their staff to stay off the telephone if they do not. Everything in a practice filters down from the top! Make your patients top priority and watch your practice grow.

Doctors should limit their consultation to 15 minutes. Many doctors spend too much time going over clinical details that parents and patients do not want to hear. Patients and parents want to know three things: how long will it take, how much will it cost, and what will it look like when you are finished? One of the biggest complaints I hear from staff is, "The only problem we have with our schedule is when we have new patients scheduled, because the doctor talks too long." I recommend reevaluating what you are saying and what time of the day you schedule new patients and consultations.

If the doctor allows "special patients" to break the office policies, this creates problems. The staff loses all credibility when the doctor overrides the policy. This also creates a situation where the patients run the schedule.

The doctor must agree to hire an adequate number of staff to efficiently run the practice. If a chair in the bay is fully booked all day, you need an associate to run the chair. For every \$15,000–\$20,000 collected each month, you need a front desk person.

Investing in an adequate number of instruments can make a difference in a schedule. Get feedback from the staff in regards to what instruments are needed.

The doctor must invest some time in training of new and existing personnel. Adequately trained assistants can run a chair more efficiently.

If there are problems in the schedule, the doctor should have a meeting with the receptionist and assistant to discuss solving the problem. Making blanket statements like, "Who scheduled this mess?" solves nothing and diminishes moral.

Clinical Staff's Responsibility

It is the clinical staff's responsibility to be supportive of the front desk. If there is a problem with the schedule, it should be discussed. Many times the assistants complain about having to stay late and blame the situation on the receptionist. The receptionist is not always in control of how late the schedule runs.

The doctor can spend less time at each chair if the assistants record all information in the patient's record.

A time goal should be set on each procedure. If every assistant is working toward the same goal, the schedule will flow smoothly. If some assistants are twice as slow as others, the schedule will not work.

Staff should not take personal calls while seeing patients unless it is an emergency. Patients should be the top priority for everyone.

All assistants need to be supportive in training new staff.

Clinical staff have the responsibility to be in the office when needed. When one person is out, the schedule is greatly affected.

Receptionist's Responsibility

The receptionist has a responsibility to follow the guidelines set up by the office in regards to schedules. If the receptionist finds she does not have the assertive skills necessary to enforce policy, it is important for her to seek assertive training.

It should be the receptionist's responsibility to keep up with missed appointments. This must be done on a daily basis in order to prevent patients from running over schedule.

The receptionist needs to make an effort to learn the clinical aspects of treatment which will help her in scheduling patients properly.

If a receptionist is having problems scheduling properly, it is her responsibility to ask for help from the doctor and the rest of the staff. Complaining gets the practice nowhere.

Additional Comments

If you are having problems setting up an effective schedule for your practice, we would be happy to work with you. This is one of the main areas evaluated in a consultation. We can help you classify your scheduling templates, set up a missed appointments system, and set up an effective pre-treatment recall system. ☺

About the Author



A consultant and speaker since 1980, Charlene White's flexible, realistic approach takes a "facilitator's path" to success, emphasizing how each practice can adapt Charlene's methods to their own style. For details on her consulting services, please call her office at (800) 445-7805. Her website is www.charlenewhite.com.