

Front Office GURU
5-Day Challenge
Day 4: Practice Worksheet

Practice Activity:

Review and practice the scripts below until you can repeat each one easily.

Then practice with a partner, who's the *coach*. Coaches, provide feedback and make sure they've mastered the script!

Do this BEFORE you try to use it with a patient. Then begin using it with your patients.

***Then, email me and let me know what you noticed, and what the patients' responses were:
dee@frontofficeguru.com

It's essential that you put our discussions about Mindset, Certainty of Voice, and Control of the Process into place when working to get someone scheduled when you only have a few appointments available. These will come in handy, as will the scripting from week 1.

Script for scheduling a POC when you only have a few times available this week

Confront the 'elephant in the room' and handle the fact that you only have a few spots this week BEFORE you start to schedule them.

Ok, [patient name], our schedule is very full for the next [give time frame] so I'll need you to work with me so I can make sure that you get in for care.

Once we get beyond [tell them when the schedule starts to open up] I'll be able to find times within your timeframe.

Let them know what you have available.

Tomorrow, I have [time A] or [time B].

Don't offer more than two times – if they can't take either of the two you could then offer a third.

You would say: Ok. I understand. I have [time C] instead.

Keep offering times that you have available until there's more space open on your schedule.

Then go back to the original process in Practice Activity #1 to finish scheduling.

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Script for scheduling a POC when you have available spaces on the schedule

The clinician should walk the new patient up front after the initial evaluation and provide a clear report on the agreed upon plan of care (POC).

Example: 'Dee this is Mrs. Smith. She's going to schedule 3x per week for 2 weeks, 2x per week for 4 weeks, for a total of 14 visits.

Announce that you're going to schedule the POC

Ok. [patient name], we're going to schedule you for [repeat back exactly what the clinician told you].

Example: Ok, Mrs. Smith, we're going to schedule you for 3x per week for 2 weeks, 2x per week for 4 weeks, for a total of 14 visits.

[Don't leave room for objections; simply continue on.]

Ask the patient, 'what days of the week don't work'.

Ok, Mrs. Smith, what days of the week don't work? [Wait for her response, she will respond]

Next, you're going to clarify what time of day works BEST.

And what time of day works best, morning, midday, afternoon, or evening?

[Don't change this or skip this question. You need them to give you a time frame, NOT an exact time...]

Clarify the times you'll be looking between.

Ok, I'll be looking between [start time] and [ending time].

Example: Let's say the patient said 'mornings' in your previous question, you say:

Ok, great! I'm going to look between 6:30 and 10:30am.

Have intention and get them in quickly.

Offer two times in their time frame.

Ok. On [day], [date], I have [time A] and [time B].

Example: On Monday March 25th, I have 9am, or 10:15am. [Wait for her response, she will respond]

Confirm the appointment time. Always repeat back day, date, and time of the appointment.

Ok. You're scheduled for Monday March 25th at 10:15am.

Move on and keep going to schedule out the full plan of care. [NEVER ask or assume that you've scheduled enough until you've scheduled them all.]