Scheduling Mastery

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Meet Your Consultant

Best known as the "Queen of Scripts," Wendy Myers knows the right words will lead clients to say yes to your medical recommendations, driving patient and practice health. As founder of Communication Solutions for Veterinarians, she teaches practical skills through online courses, onsite and virtual consulting, and conferences. Wendy's experience as a partner with eight veterinarians in an AAHA-accredited specialty and emergency hospital helped her understand issues that practice owners and managers face. A certified veterinary journalist, she has authored six books and has monthly columns in *Veterinary Practice News* and *dvm360* magazines, ensuring her industry knowledge is relevant for today's veterinary teams. Learn how Wendy can train your team at csvetscourses.com.

What you'll learn:
Chapter 1: Organize your schedule for efficiency
- Guidelines for doctor and technician appointments
- Use pre-blocked appointment types to keep exams on time
- Prioritize urgent care and sick-patient appointments
- Best practices for online scheduling tools
- Forward book the next appointment at the conclusion of each visit
- 5 steps for shorter scheduling calls

Chapter 2: Prevent no-shows and late arrivals
- Collecting deposits for new client appointments and procedures
- Provide pre-appointment instructions and have clients complete digital forms
- Get a sample Cancellation/No-Show/Late Arrival Policy
- When to send confirmations and what they should say
- Prevent late arrivals

BONUS: Facilitator's guide to implement the training

CHAPTER 1: ORGANIZE YOUR SCHEDULE FOR EFFICIENCY

Who controls your schedule: You or Clients? You need to turn a client-driven chaotic schedule into a practice-focused schedule. Keeping appointments organized will maximize your team's productivity, allowing your hospital to operate more efficiently and profitably. You can expand your number of patients seen and be available for sick patients that need same-day care. How you schedule appointments will have a massive impact on your team's workflow.[1]

Here are top strategies to go from a mismanaged to an efficient schedule:

Set up appointment types and lengths. Having 30 minutes for every patient appointment doesn't match the reality of how the schedule flows throughout the day. Some patients need 10 minutes for a progress exam while others need 40 minutes for a complex medical problem. When clients arrive late or ask, "Could you also check…?" during exams, your team gets frustrated, and the schedule runs behind. If doctors see 30-minute appointments and work 8 hours with a 1-hour lunch break, they can only see 14 patients per day.

Create scheduling guidelines. Use the Flex-10 Scheduling System, which has appointment lengths "flex" based on the reason for visit. Appointments are in 10-minute increments: 10, 20, 30, 40, 50, or 60 minutes. Expand these guidelines based on the types of appointments you see.

Veterinarian Appointment Guidelines

Length of exam	Type of appointment
10 minutes	Level 1 progress exams (minor problems) New client surgical admission (if new client did not have a presurgical consult) Surgical discharge (if doctor release is needed) Doctor client communication block (10 to 20 minutes, two to three times per day)
20 minutes	Pediatric progress exam (second, third, and fourth puppy and kitten exams) Preventive adult pet checkup (Age 1 to 6) Complicated medical/surgical discharge Level 2 progress exam (Follow up on complex problems)
30 minutes	Disease-management exam (chronic health conditions) X-rays (Technicians will take x-rays, but the doctor will need 10 to 20 minutes to interpret images, diagnose, and discuss results with clients.) Level 1 sick patient exam (illness, limping, skin) New clients Ophthalmic (eye) exams Quality of life consultation (possible euthanasia) Preventive senior pet checkup (Age 7 and older) Unattended euthanasia (Admission, good-byes, consent form) Urgent care exam (same-day sick)
40 minutes	Attended euthanasia Level 2 sick patient exam (diarrhea, vomiting, multiple symptoms) Pediatric exam (First puppy and kitten exams. You can double-book the doctor if necessary because the technician will do most of the client education.) Second opinions New client with sick pet
50 minutes	Behavior consultation Litter of puppies or kittens (increase or decrease time depending on size of litter)
60 minutes	Sick exotic pets Workups for chronic conditions such as cardiac ultrasound

Keep the same appointment lengths for all doctors. If you have 3 veterinarians and 3 different appointment preferences, you'll confuse staff and clients. The only temporary exception to this rule: New graduates or associates who are learning your practice's protocols and software will need an additional 10 minutes for appointments during their 90-day introductory period. Having all doctors follow the same scheduling protocols will increase productivity and help your team equally schedule veterinarians.

Technician/Veterinary Assistant Appointment Guidelines
Avoid the chaos of walk-in technician appointments. You could have 4 clients arrive in the morning and request nail trims, pulling technicians and assistants away from preparing patients for morning procedures. Starting surgery late will derail the surgical schedule.

Create a technician column in your schedule just as you have columns for doctor appointments. Designate which technicians and/or assistants will handle technician appointments each day. Your goal is to have full technician appointments each day, which increases your patient capacity and revenue. For clients to schedule technician appointments, require patients to have a physical exam from a veterinarian within 1 year, which defines a veterinary-client-patient relationship.

To help clients understand the difference between duties performed by a veterinarian vs. technician, use the term "exam" when a veterinarian performs a physical exam. Use "health assessment" when a

technician or assistant evaluates patient health. The term "health assessment" applies in the human nursing profession.[2] Veterinarians should set protocols for which patients will need health assessments for services delivered in technician appointments.

A health assessment performed by a technician or assistant includes four services:
1) Get patient's vital signs (i.e., temperature, pulse, respiration, weight)
2) Ask history questions
3) Update medical record
4) Deliver services

Which patients will need health assessments for technician or assistant appointments?
Yes: Perform and charge fee for a health assessment
- Change bandages
- Clean ears
- Anal gland expressions
- Administer subcutaneous fluids
- Laser therapy after initial session
- Booster vaccines
- Weight checks
- Suture removal

No: Health assessment not medically necessary
- Nail trim
- Collect urine
- Blood draws for lab tests
- Intestinal parasite screen
- Microchipping

In the United States, practice acts define which duties credentialed technicians may perform. Consult your state's guidelines on technician duties and whether veterinary supervision must be direct or indirect (https://www.avma.org/advocacy/state-and-local-advocacy/veterinary-state-board-websites). Canadian practices should consult with their province veterinary medical association. For example, the Ontario Association of Veterinary Technicians holds regulatory powers over the profession of Registered Veterinary Technicians in Ontario, according to Bill Pr3, 1993 (https://oavt.org).

Technician/Veterinary Assistant Appointment Guidelines

Length of exam	Type of appointment
10 minutes	Anal gland expression Blood draws for lab testing Intestinal parasite screen Microchipping Level 1 nail trims (cooperative patients) Suture removal Booster vaccines that don't require a doctor's exam (i.e., Bordetella, Lyme, Leptospirosis) Weight checks for pets on weight-management programs
20 minutes	Change bandages Clean ears Level 2 nail trim (Patient needing Fear-Free® techniques or extra staff to assist) Administer subcutaneous fluids Collect urine Laser therapy after initial session
30 minutes	Bird grooming Scheduled follow-up x-rays

Use appointment type templates in your PIMS. Because so many employees use the schedule, you need goof-proof methods so a sick patient that needs 40 minutes doesn't get booked in a 10-minute slot for a progress exam. To help employees choose the right appointment type every time, set up templates in your practice-management software. Each appointment type will have 1) Appointment type name, 2) Length, and 3) Color code. For example, a Level 2 sick patient exam is 40 minutes and dark yellow.

Color code your appointment types so you can see the workflow. As you book exams throughout the day, strive to create a rainbow pattern of appointment types rather than large blocks of similar colors.

Sample Appointment Color Codes

Appointment type	Length	Color code
Preventive adult pet checkup	20 minutes	Light green
Preventive senior pet checkup	30 minutes	Dark green
Level 1 sick patient exam	30 minutes	Light yellow
Level 2 sick patient exam	40 minutes	Dark yellow
Level 1 progress exam	10 minutes	Light blue
Level 2 progress exam	20 minutes	Dark blue
Pediatric exam (First puppy/kitten exams)	40 minutes	Light purple
Pediatric progress exam (Second, third, and fourth puppy and kitten exams)	20 minutes	Dark purple
Disease management exam	30 minutes	Orange
Doctor client communication block	10 to 20 minutes	Gray
Lunch	1 to 2 hours	Black
Attended euthanasia	40 minutes	Light pink
Unattended euthanasia	30 minutes	Dark pink
Urgent care exam (Same day sick patient)	30 minutes	Red
New client	30 minutes	Lime green
Procedures	Varies based on surgical or dental procedure	Orchid

Prepare for holidays. Block off holidays in your appointment schedule when your practice will be closed. Set an early deadline for employees to request time off for holidays so you can provide timely approvals and ensure adequate staff coverage. Appointment requests may increase a few days before and after holidays. Schedule fewer wellness appointments on days before and after holidays so you can accommodate more sick patients. Add more urgent care slots on the first business day after holidays.

Use two to three exam rooms per veterinarian. A doctor can't work efficiently with a single exam room. Veterinary practices need 2 to 2.5 exam rooms per veterinarian.[3] Outpatient doctors need 1 to 2 technicians and/or veterinary assistants to support them in working rooms. With two exam rooms, the veterinarian sees one patient while a technician assists with patient handling during the physical exam. Another assistant rooms the next patient, collects vital signs, and asks history questions. Three exam rooms allow the doctor to see one patient while a technician rooms the next patient and another assistant completes the previous patient's post-visit tasks.

Schedule from noon. Book morning appointments from noon backward and afternoon appointments from noon forward.[4] This technique lets you maintain maximum productivity and ensure most of the day is full. If morning or afternoon slots don't get filled, call clients on your wait list, have staff or department meetings, catch up on recordkeeping, make follow-up calls about recently hospitalized or sick patients, or call clients with overdue pets. Some staff may be able to leave early or arrive later, reducing overhead.

BONUS TIP: How to Have Faster Scheduling Calls
Don't ask clients, "When do you want an appointment?" Be the boss of the call, leading clients to slots that give you efficient workflow and shorter call times.

Scheduling calls average 8 minutes.[5] The cross-industry best practice is 3.7 minutes. Scheduling an appointment should take 3 to 5 minutes for existing clients. Booking new client appointments should average 5 to 7 minutes because you will gather client and patient information to set up the electronic medical record (EMR). Follow 5 steps for faster call times:

Step 1) Access the patient record. Skim the record to identify which services are due so you may choose the right appointment type and length. Here are 2 shortcuts to open records faster:

Use caller ID. While answering, key the phone number in your practice-information-management software (PIMS) to see whether the caller is an existing client. Never ask, "Can I get your phone number so I can look up your account?" Clients will feel they are being processed and are just numbers. If the phone number isn't in your database or it's an anonymous number, **SAY THIS:** *"May I get your name and your pet's name so I may access the patient record?"*

Use FetchIt® instant client retrieval software. Fetchit software integrates with your PIMS and phone system to open the patient's EMR when the phone rings (https://schultztechnology.com/veterinary-practice-management-software/). If a client calls and the phone number is in your software, a blue bubble appears on the desktop. With one click, you open the EMR. Clients don't have to spell their names or repeat information. Fetchit also provides reports on your call volume by day, hour, and CSR.

Step 2) Determine the reason for the exam. This lets you choose the right appointment type and length. After you access the EMR, **SAY THIS:** *"What will we be seeing <pet name> for?"*

Step 3) Ask about doctor preference. Progress exams should be scheduled with the same veterinarian whenever possible to have efficient exam time. For progress exams, **SAY THIS:** *"Let's schedule the progress exam to ensure timely follow-up care. Dr. <Name> can see <pet name> on <date, time 1> or <date, time 2>. Which do you prefer?"* For all other types of appointments, **SAY THIS:** *"Do you prefer a specific doctor or want the first available appointment?"* With today's overloaded schedules, most clients will pick the first available and be grateful for your suggestion.

Step 4) Use the yes-or-yes technique to offer the next 2 available appointments. Don't get sucked into the time-consuming back-and-forth banter of "What day of the week do you want?" and "What time of day do you prefer?" Lead the caller to 2 exam choices that will work well for your schedule's flow.

SAY THIS: *"Our next available appointments are <date, time 1> and <date, time 2>. Which do you prefer?"* This lets you control your schedule rather than clients dictating when they want to visit.

Step 5) Summarize details when closing the call. You will set client expectations to get a confirmation text or email and will significantly improve compliance—and revenue—for intestinal parasite testing. Poop is good patient care and good business!

SAY THIS: *"We will see <pet name> for a checkup at <date, time>. Please bring a stool sample for an intestinal parasite screen. You'll get a text confirmation shortly with a link to an online patient form to complete and submit before the appointment. Have a great day!"*

When you follow these 5 steps, you will cut scheduling calls in half and lead phone conversations in a polite and professional manner.

Reduce call time with digital forms. Collecting patient information can be a time-suck, especially when done on the phone or in person. Waiting until check-in to complete paperwork also can steal previous exam time. You could spend up to 15 minutes on a new client scheduling call to gather patient breed, gender, species, reproductive status, age, color, vaccine status, and other details. Likewise, an existing client's call could get lengthy when describing sick pet symptoms. Capture key information to book appointments and use digital forms to gather details for the medical team.

Use online and app booking. Appointment scheduling is your No. 1 call type. CSRs spend half or more of their workdays scheduling appointments. Research shows 70% of consumers prefer to schedule appointments via text or app.[6] A productivity study found CSRs reduced time 54% by responding to messages compared to talk time over the phone.[7] The 8-minute scheduling call drops to 4 minutes to review and reply to a digital request. You can serve two clients in the time that it takes for one phone call.

When considering online and app scheduling for your practice, decide whether you want clients to submit appointment requests or direct booking. Both have advantages.

Appointment requests allow you to have the greatest control of your schedule because CSRs will review the reason for visit, needed appointment length, and then choose the best slot for efficient workflow. Scheduling is an art and science.

Direct booking lets clients schedule appointments directly from your website, 24/7. Your online scheduling tool should integrate with your PIMS. Clinics using direct booking report up to 44% of appointments made online occur after business hours.[8] This lets your practice capture revenue when closed and reduce call volume.

When setting up direct booking in your online scheduling platform, you will create appointment types, duration, whether to allow direct booking for new and/or existing clients, and doctor preference. Existing clients will enter their phone numbers or email addresses while new clients will complete client and patient information. Clients can choose the reason for visit such as new patient exam, checkup, technician appointment, grooming, and other appointment types you allow for direct booking. They select the preferred provider, day, and time. Clients click to confirm appointment details and are sent confirmations. The appointment writes back to your PIMS and shows it was direct booking.

Don't have your entire schedule available for direct booking because clients may create an inefficient schedule of back-to-back sick patient exams or other schedule mismanagement. Instead, have pre-blocked appointment types and times available online.

You should pre-block four appointment types in outpatient doctors' daily schedules:

1) Wellness appointments
Pre-blocked checkups are like the slices of bread in a club sandwich, creating structured layers that hold the schedule together. If you take the bottom slice of bread off, put it on top, and pick up the sandwich, it will fall apart and make a mess. Likewise, wellness appointments are structured layers that keep your schedule running on time and ensure the medical team gets their meal breaks and goes home on time.

Pre-block four **wellness appointments** in each doctor's daily schedule to ensure efficient exam workflow:
- **First appointment of the day:** Doctors are confident about preventive care, which creates a positive mindset for the day.
- **Appointment before lunch:** Because checkups are predictable and more likely to finish on time, the outpatient team can enjoy well-timed lunch breaks.
- **Appointment after lunch:** A checkup after lunch begins the afternoon on time.
- **Last appointment of the day:** Wrapping up the day with a checkup ensures the outpatient team goes home on time.

2) Urgent care appointments

Clients will call every morning with sick patients that need same-day care. Be a hero and pre-block your schedule. Pre-block four to six **urgent care exams** in each doctor's daily schedule for same-day appointment availability for sick pets:

- **Second appointment of the day:** Strive to sandwich a checkup after the urgent care slot.
- **Two appointments before lunch:** A checkup follows this urgent care exam to ensure the outpatient team goes to lunch on time.
- **Two appointments after lunch:** This urgent care follows a checkup. Sandwich it between another checkup at 2:00 p.m.
- **Three appointments before end of shift/closing:** Your last urgent care slot of the day should be 60 to 90 minutes before closing. This allows for appropriate workup and treatment time and ensures your team goes home on time.

You may need more reserved slots on Mondays, Fridays, and Saturdays when most practices have higher sick-patient demands. If your practice is closed on Sundays, you may have more urgent care needs on Mondays. Fridays see a spike for clients whose pets became ill on Tuesdays, and they took a wait-and-see approach. Conditions worsened and now they need urgent care. Saturdays have increased demands for clients who work weekdays and prefer weekend appointments.

Stagger urgent care blocks by one hour in multi-doctor practices. This eliminates bottlenecks in the treatment area, laboratory, and radiography when several patients need workups. You'll also prevent the steal-the-technician game among doctors. Block urgent care appointments about every 90 minutes. Here's an example of urgent care blocks when two doctors are seeing outpatient appointments:

Doctor 1 urgent-care slots	Doctor 2 urgent-care slots
9:00 a.m.	10:00 a.m.
10:30 a.m.	11:30 a.m.
12:00 p.m.	1:00 p.m.
1:30 p.m.	2:30 p.m.
3:00 p.m.	4:00 p.m.
4:30 p.m.	5:30 p.m.

Reserve the last urgent care slot 60 to 90 minutes before closing. If your practice closes at 6 p.m., your last urgent care slot will be at 4:30 p.m. Never have your last appointment of the day as an urgent care slot. You and your team risk working late, and you're paying overtime.

If you're a practice owner or manager who is anxious about having six empty appointments held in your daily schedule, don't worry. Urgent care slots always get taken. If you're skeptical, release open urgent care slots 90 minutes before the reserved block. Let's say you have an urgent care block at 11 a.m. It's now 9:30 a.m. and miraculously, no one has called with a sick pet that needs to be seen today. Your next call is a client who adopted a kitten over the weekend and needs an appointment. **SAY THIS:**

"Congratulations on your new baby! We'd love to meet your kitten today. Dr. <Name> has an appointment available at 11 a.m. Can we see <kitten name> then?"

3) New client appointments

Pre-block **new client appointments** based on your average number of new clients per month. If a full-time doctor averages 25 new clients per month, pre-block 1 new client appointment per day. Use mid-morning or mid-afternoon slots, which are sometimes the last to be taken.

4) Doctor-client communication slots

Get administrative tasks done with doctor-client communication blocks. Veterinarians need administrative time to review lab results, update medical records, approve prescriptions, and call/text/email clients and vendors. Without dedicated time for administrative duties, veterinarians risk job burnout and mental health.

Reserve three 20-minute slots at mid-morning, mid-afternoon, and near the end of the day such as 10:10 a.m., 2:10 p.m., and 4:10 p.m. If a client calls at 11 a.m. about her cat's lab results and asks to speak with the veterinarian, the CSR can explain, *"Dr. <Name> is seeing patient appointments now and will be available between 2:10 and 2:30 p.m. to return calls. What is the best phone number to reach you, and may the doctor also text you?"* You'll set expectations and may be able to turn a callback into a faster "textback" for appropriate types of communication.

Sample pre-blocked schedule
Add pre-blocks to doctors' daily schedules and fill in open appointments as clients call and use online scheduling tools. In this example, practice hours are 8 a.m. to 6 p.m. Doctor #1 works 8 a.m. to 5 p.m. while Doctor #2 works 9 a.m. to 6 p.m. Both see outpatient appointments. Doctor #3 performs surgery in the morning and sees outpatient appointments in the afternoon. Doctor #3 only has 1 pre-blocked urgent care slot in the afternoon due to a shorter appointment schedule.

Time	Doctor 1	Doctor 2	Doctor 3
8:00 AM	Senior wellness appointment	Off, shift starts at 9 a.m.	Surgery + dental
:10			Includes client callbacks
:20			
:30	Urgent care appointment		
:40			
:50			
9:00 AM		Adult wellness appointment	
:10			
:20		Urgent care appointment	
:30			
:40			
:50			
10:00 AM			
:10	Doctor-client communication slot		
:20			
:30		New client appointment	
:40			
:50			
11:00 AM	Urgent care appointment		
:10			
:20			
:30	Senior wellness appointment		
:40		Doctor-client communication slot	
:50			
12:00 PM	Lunch	Urgent care appointment	
:10			
:20			
:30		Senior wellness appointment	
:40			
:50			
1:00 PM	Adult wellness appointment	Lunch	
:10			
:20	Urgent care appointment		
:30			Lunch
:40			
:50			
2:00 PM		Adult wellness appointment	

Time	Doctor 1	Doctor 2	Doctor 3
:10	Doctor-client communication slot		
:20		Urgent care appointment	
:30	New client appointment		Senior wellness appt
:40			
:50			
3:00 PM			Urgent care appt
:10			
:20			
:30			
:40	Urgent care appointment	Doctor-client communication slot	
:50			
4:00 PM			Dr-client communication
:10	Doctor-client communication slot		
:20			
:30	Senior wellness appointment		
:40			Adult wellness appt
:50		Urgent care appointment	
5:00 PM	End of Dr. 1 shift		End of Dr. 3 shift
:10			
:20		Doctor-client communication slot	
:30			
:40		Adult wellness appointment	
:50			
6:00 PM		End of Dr. 2 shift, hospital closed	

Create level 1 and 2 exam types. A Level 1 sick patient exam is a 30-minute appointment for conditions such as illness and limping. A Level 2 sick patient exam is 40 minutes for diarrhea, vomiting, or multiple symptoms. A Level 1 progress exam is 10 minutes for follow-up care on minor problems such as an ear infection. A 20-minute Level 2 progress exam is for complex problems such as continuing care on skin or diabetes. Veterinarians will define conditions for Level 1 and 2 exams so CSRs may follow appointment scheduling guidelines. Charge exam fees based on the level and appointment length (time is money).

Stagger doctors' lunches. A doctor is always present during opening hours should a walk-in emergency occur. Each outpatient doctor-technician-assistant team takes their lunch breaks at the same time. For example, Doctor #1 has two assistants supporting her with outpatient exams, and the team of 3 have their lunch break from 12 to 1 p.m. Doctor #2 has a technician and assistant on his outpatient team, which has their lunch break from 1 to 2 p.m. Patient care is continuously delivered during opening hours, increasing staff productivity and reducing overhead costs.

Use a patient waiting list. You need a process to quickly fill last-minute cancellations. Your PIMS may have the ability to keep a list and send notifications. Text lets you quickly message clients and ask them to call you immediately if they want the appointment. This is a more efficient use of your time than making outbound calls because 67% of people don't listen to voicemails.[9]

TEXT THIS: "Because you are on our patient waiting list, we have an appointment available for <pet name> today at <time>. Shall we reserve this appointment for you?" If the client agrees, reply with, "I'm glad we're able to see <pet name> today. You will get a confirmation with a digital form to complete now so the medical team can prepare for your appointment at <time>."

Sandwich sick patient exams between checkups. Avoid the schedule derailing pattern of three sick patient exams in a row. You will get behind. Aim for the scheduling pattern of checkup/sick patient/checkup. Preventive care is more predictable and likely to stay on time. Checkups are guardrails that contain the sick patient exam.

Be strategic if you double-book patients. If a sick patient needs to be seen today, have the client visit when other wellness appointments are scheduled. Checkups are more predictable and likely to stay on time. A veterinarian may be able to examine the double-booked sick patient while a technician wraps up a wellness appointment. If you double-book two sick patients in the same slot, you risk increased wait time, rushing the medical team, and falling behind on appointments following the double-booking.

Offer day admissions. When a sick patient needs to be seen today but your schedule is full, offer a day admission appointment. You will admit the patient to the hospital for the day. A technician will get vital signs and ask history questions upon intake to prioritize the urgency of the case. The technician will share information about the patient with the doctor after intake. Based on medical urgency, the doctor may be able to see the patient between appointments or after surgery. Some hospitals designate an inpatient doctor who sees urgent care, emergencies, work-ins, workups, and walk-ins.

Set a limit on the number of day admission appointments based on the number of doctors and technicians scheduled. Charge a day admission fee equivalent to 1-12 hours hospitalization to cover nursing care in addition to the urgent care exam fee.

Never call this a drop-off appointment, which devalues professional services and is defined as a brief delivery—hand you the leash or cat carrier and go. You would never drop-off a beloved family member on a hospital's doorstep. Use the term "day admission appointment" instead. Explain the process and fee upfront.

SAY THIS: *"I'm concerned that your pet is sick. Although our schedule is full, we can admit your pet to the hospital for the day. For 15 minutes, you will meet with a technician, who will ask you questions about your pet's symptoms and get its vital signs. A doctor will examine your pet during the day based on medical urgency, and then contact you about next steps. We will provide a treatment plan with services and fees and get your approval in advance. You may pick up your pet between 4 and 6 p.m. Because we will provide nursing care for your pet throughout the day, there is an additional day admission fee of $__. We can admit your pet this morning. What time will you arrive so a technician can prepare to admit <pet name>?"*

Open the schedule 13 to 15 months in advance.[10] This lets staff book patients' next annual checkups at the end of their current visits, allowing a few months' flexibility if clients can't return exactly 12 months after current visits. Don't worry if veterinarians' schedules change. Doctors will request time off in advance for vacation and conferences, especially if booking travel. Simply contact clients whose appointments need to be moved.

SAY THIS: *"Dr. <Name> asked me to call you to reschedule <pet name>'s appointment on <original date> because he/she will be out of the office. The doctor can see <pet name> on <date, time 1> or <date, time 2>. Which do you prefer?"*

Use forward booking for four appointment types:

1. Progress exams. A Veterinary Hospital Managers Association report found 76% of teams forward book progress exams.[11] Tell clients when their pets need to be seen next, avoiding the yes-or-no choice of "Do you want to schedule your next appointment?" Follow the guideline of "same day, same time, same doctor."

Schedule follow-up care at the end of each visit. If you have computers in exam rooms, have the medical team schedule progress exams while still in exam rooms. In dental practices, hygienists have greater success with pre-appointing patients than scheduling coordinators at checkout.[12] By the time patients reach the checkout counter, they want to leave and may dismiss CSRs' attempts to schedule. Clients also walk through the "mind-erase hallway" from the exam room to the front desk, forgetting to schedule

follow-up care. CSRs were present for the exam and may not know a progress exam is needed unless it's noted in the medical record. See how easy it can be for patients to fall through the gap?

SAY THIS: *"Dr. <Name> needs to see <patient name> in <time interval> for a progress exam. Do you prefer <date, time 1> or <date, time 2>?"*

Use the veterinarian's name to bring authority to the request. "Needs" communicates that follow-up care is medically necessary. Avoid the term "recheck," which clients may misinterpret as optional care that is also a no-charge exam. Always schedule progress exams with the same veterinarian for efficient exam time. If a different doctor sees the patient for follow-up care, the veterinarian will need more time to review the record and reassess the patient. Seeing the same veterinarian also builds client confidence that the medical problem will be resolved. Lead the client to book now with the yes-or-yes technique, offering the next two progress exams in the timeframe that follow-up care is needed.

Forward booking follow-up visits will save time for your team because clients don't need to call back to schedule appointments. You also risk that follow-up care won't happen if clients forget. Integrate telemedicine for appropriate follow-up visits. Telemedicine visits may be faster than in-person appointments. Intersperse telemedicine visits with in-person appointments or dedicate blocks of time on specific weekdays.

2) Checkups. Six out of 10 pet owners will forward book their pets' checkups.[1] Use a comparison that clients already understand: Dentists.

SAY THIS: *"Just as your dentist has you schedule your next appointment at checkout, we do the same to proactively manage your pet's health. Dr. <Name> can see your pet at <date, time 1> or <date, time 2>. Which do you prefer?"* The first choice is the same day of the week and time as today's appointment. The second choice is a different day of the week and time of day (morning vs. afternoon).

When a procrastinator won't book, be persistent and use benefit statements. **SAY THIS:** *"I understand you don't know your schedule 12 months from today. Let's book your pet's next checkup for this same day and time next year. We will confirm as the date nears in case you need to change the appointment. By scheduling today, you will get your first choice of doctor, day, and time. Your appointment reminder for <date, time> will print on today's receipt, and you'll get a text/email confirmation."*

Pediatric exams: If you're booking three weeks out, puppies and kittens risk missing timely immunizations. During the first pediatric exam, forward book the remaining series of appointments. If a client visits today with an 8-week-old puppy, **SAY THIS:** *"Your puppy will need exams and vaccinations at 12 and 16 weeks of age. We need to provide timely exams to monitor <pet name>'s growth and development and vaccines for ongoing protection. We will schedule your puppy's next two appointments today, so you will get your first choice of time, day, and doctor. Let's set the next appointment when your puppy will be 12 weeks old. Do you prefer <date, time 1> or <date, time 2>?"* Once the client agrees, **SAY THIS:** *"Now let's book the 16-week visit. Do you prefer <date, time 1> or <date, time 2>?"* Let the client know to expect confirmations.

3) Procedures. When patients need surgical or dental procedures, give clients treatment plans that explain services and fees on the day of diagnosis and lead them to book now. This is especially important for busy practices that may full surgical and dental schedules for 2 or more weeks.

SAY THIS: *"Dr. <Name>'s next available procedure days are <date 1> and <date 2>. Which do you prefer?"*

You also can forward book spays and neuters during the last puppy/kitten appointment. Let's say the doctor sees a 16-week-old kitten today and wants to spay it at 6 months of age. **SAY THIS:** *"Dr. <Name> advises spaying your kitten anytime between 12 weeks to 6 months of age. Spaying also has health and medical benefits. Dr. <Name> can perform your kitten's surgery on <date 1> or <date 2>. Which do you prefer?"*

Once the client agrees to a surgery date, set an admission appointment time and provide pre-surgical instructions. Have the client sign the surgical treatment plan and anesthetic consent today or send digital forms with the confirmation. You may want to collect a percentage of the surgical fee upfront or a surgical reservation fee to prevent no-shows. I share how to create a preadmission process, set admission and discharge appointments, and use a point system to budget the number of procedures in my online course on Organizing Your Surgery Schedule (https://csvets.info/surgeryschedule).

4) Disease-management exams. When pets are diagnosed with chronic health conditions, have doctors use a "disease-management exam" code and set the reminder interval based on the disease stage. Update the patient's exam code from "senior preventive exam" to "disease-management exam." Set the reminder interval based on the frequency of follow-up care.

This pre-appointing concept is especially important for patients with chronic health conditions such as cardiomyopathy, hyperthyroidism, kidney disease, arthritis, and diabetes. Forward booking will let the veterinarian provide optimal disease management. Clients also will appreciate that the veterinarian has spread out the cost of care.

Let's say you diagnose a dog with arthritis and prescribe a non-steroidal anti-inflammatory drug and therapeutic diet. You want to see the patient every six months for exams and drug monitoring tests.

After explaining the diagnosis and answering the client's questions, the veterinarian will explain when the next follow-up care is needed. Explain the "why" behind the change in frequency of exams and use benefit statements. **SAY THIS:** *"Because <pet name> was diagnosed with arthritis today and will begin long-term medication, I need to see your dog every 6 months to successfully manage his/her arthritis and check blood work in case I need to adjust medication dosages. Six months from today will be <date>. I can see <pet name> at <time 1> or <time 2>. Which do you prefer?"*

CHAPTER 2: PREVENT NO-SHOWS AND LATE ARRIVALS

Prevent no-shows
No-shows can cost your practice $66,000 per doctor annually in lost business. The average no-show rate is 11%.[13] Let's say one full-time veterinarian sees 3,000 appointments per year and has an average doctor transaction (ADT) of $200. He risks losing $66,000 annually ($200 ADT x 330 missed appointments). A three-doctor practice faces a loss of $198,000. Enough! The right confirmations sent at the right times will reduce no-shows. Confirmations can include pre-appointment instructions such as completing online history forms and paying deposits.

Digital intake forms
Intake forms save 10 to 15 minutes that technicians and assistants previously spent asking history questions at the start of appointments. Doctors and technicians can review clients' answers before exams and ask follow-up questions, resulting in more efficient use of exam time.

Your PIMS or third-party client communication app can automatically send digital forms through text and email based on appointment type. For example, a client who has a checkup for a cat will get a Feline Adult Wellness Form. A client will get an anesthesia consent form for a pet scheduled for surgery. If pet owners have invested time and effort to complete intake information, they are less likely to no-show. Depend on compatibility with your PIMS, you can set up forms to write back into patient records automatically after they have been submitted by clients or manually save forms for non-integrated PIMS.

Customize intake forms based on the reason for visit such as:
- Anesthesia consent
- Boarding intake
- Canine and feline adult wellness visit
- Grooming intake
- New client form
- New puppy/kitten form
- Progress exam history form
- Quality of life medical form (possible euthanasia consult)
- Sedation/treatment
- Sick patient visit
- Technician appointment history form

A technician appointment history form could ask reason for visit with a list of services for clients to check all that apply such as nail trim, vaccine booster, SQ fluid therapy, anal gland expression, ear cleaning, Cytopoint injection, or other services that technicians may provide (https://lakeroadanimalhospital.com/nurse-curbside-care-form/). Along with history questions, the form should also ask, "Do you have any additional questions or concerns?" This may flag any health issues that require a doctor rather than technician appointment.

Taking deposits
If your practice collects deposits for new client appointments and procedures, create a deposit policy to define whether deposits are refundable, which cancellation reasons will be accepted, and how far in advance appointments must be cancelled. Your cancellation policy should meet three criteria:[5]
1) **It's clearly communicated.** Display your cancellation policy on your online booking page, reminder messages, at your practice, and on your website.
2) **It's easily documented.** You need to document that the policy was communicated, and a violation occurred. Include a link to your cancellation policy in text and email confirmations. Put an alert in your PIMS if a client is a no-show. If no-shows are documented, you can better handle any disputes from clients.
3) **It's consistently upheld.** Treat each client the same to avoid potential issues.

Avoid the term "deposit" because clients may assume they will get money back when pets are returned in good condition. Check local laws on deposits and partial payments (https://www.findlaw.com/consumer/consumer-transactions/customer-returns-and-refund-laws-by-state.html). You may need to post refund policies. In California, businesses are required to post refund policies unless they offer a full cash refund, exchange, or store credit within 7 days of the purchase or payment date. In Colorado, there is no right to cancel contracts or purchase agreements. Whether a client can receive a refund is dependent on the practice's return and refund policies.[14] Instead of "deposit," use the terms appointment or surgical "reservation fee" or "prepayment." I share how to create a preadmission process, set admission and discharge appointments, and use a point system to budget the number of procedures in my online course on Organizing Your Surgery Schedule (https://csvets.info/surgeryschedule).

Send clients digital invoices by text, email, or your client communications app. Clients can prepay appointment and surgical reservation fees and boarding reservations. Create perception of value when sending the text and digital invoice. **TEXT THIS:** <Pet name>'s surgical admission appointment is <date,

time>. To help you prepare for your pet's surgery, preadmission instructions are attached. Here is your invoice for the surgical reservation fee. Tap the invoice to pay.

When new clients call to book, explain, *"We have scheduled <pet name>'s appointment for <date, time>. I will text you our new client form so you can share information about you and your pet to help our medical team prepare for your first visit to our hospital. You also will get an invoice for your new client appointment reservation fee of $XX. This amount will be applied to your first appointment. If you need to change this appointment, we need at least 24 hours' notice for it to be refund eligible, OR This appointment reservation fee is nonrefundable. We look forward to meeting you and <pet name>."*

Send a series of 5 appointment confirmations. You'll prevent no-shows and ask clients to complete intake forms in advance. Clients will get up to five reminders, depending on how far in advance they book appointments. A pet owner who schedules a checkup three weeks ahead will get five confirmations while a client who books a same-day sick pet appointment will get one.

When to confirm	Deliver via	Pre-appointment instructions
1. Immediately after appointment is booked	Text and email	Calendar invite
2. 2 weeks before appointment	Text and email	Share cancellation policy, option to reschedule
3. 5 days before appointment	Text and email	Last call if clients need to reschedule or cancel
4. 2 days before appointment *1 day before: Call clients if unconfirmed and/or intake form has not been received.*	Text and email	Complete intake form based on reason for visit
5. Day of appointment	Text and email	Same-day instructions (i.e., bring stool sample)

1st confirmation, immediately after appointment is booked:

<u>Existing Clients</u>
TEXT THIS: Thanks for scheduling a <visit name> for <pet name>! Your appointment is confirmed for <time, date>. If your schedule changes, use this link to reschedule. We'll send you another reminder as your appointment date nears to let you know what to bring. <Attachment: Calendar invite>

EMAIL THIS:
Subject line: Confirming your pet's appointment 📝 Add to calendar
Email message: Thanks for scheduling a <visit name> for <pet name>! To prepare for your appointment, please:
1. Add the appointment for <time, date> to your calendar.
2. Watch for reminders as your appointment date nears. We'll let you know what to bring.
3. If your schedule changes, use this link to reschedule.
We appreciate the opportunity to care for <pet name>!
<Attachment: Calendar invite>

<u>New Clients</u>
TEXT THIS: We're excited to meet <pet name>! Your <visit name> is confirmed for <time, date>. If your schedule changes, use this link to reschedule. We'll send you another reminder as your appointment date nears to let you know what to bring. Here is an invoice for your new client appointment reservation fee. Tap the invoice below to pay. <Attachments: Calendar invite, invoice>

EMAIL THIS:
Subject line: We're excited to meet your pet 📝 Reservation fee due
Email message: We're excited to meet <pet name>! Your <visit name> is confirmed for <time, date>. To prepare for your appointment, please:
1. Add the appointment for <time, date> to your calendar.
2. Here is your invoice for your new client appointment reservation fee. Tap the invoice below to make a payment.
3. Watch for reminders as your appointment date nears. We'll let you know what to bring.
4. If your schedule changes, use this link to reschedule.

We look forward to meeting you and <pet name>!
<Attachments: Calendar invite, invoice>

2nd confirmation, 2 weeks ahead:

Same message for existing and new clients
TEXT THIS: Just a quick reminder that <pet name> has a <visit name> on <date, time>. If you are unable to keep this appointment, use this link to reschedule or notify us at least 24 hours in advance per our cancellation policy so we may help another patient in need. Watch for a note a few days before your appointment for your pet's intake form and what to bring.

EMAIL THIS:
Subject line: Reminder ☝️ Your pet has an upcoming appt
Email message: Just a quick reminder that <pet name> has a <visit name> on <date, time>. To get ready, please:
1. Watch for a note a few days before your appointment for your pet's intake form and what to bring.
2. If you are unable to keep this appointment, use this link to reschedule or notify us at least 24 hours in advance per our cancellation policy so we may help another patient in need.

We look forward to seeing you and <pet name> soon!

BONUS TIP: Sample Cancellation/No-Show/Late Arrival Policy
Confirmations can include a link to your cancellation policy on your website. Here's a sample policy to customize for your practice:

If you are unable to keep an appointment, please call us **at least 24 hours in advance** to reschedule or cancel so we may help another patient needing treatment. Our veterinary-client-patient relationship is based on mutual trust and respect. To keep appointments on time, we provide multiple text and email reminders for all clients.

Late Arrival Policy: We ask you to arrive before your scheduled appointment time so your pet may benefit from the full exam time. New client and intake forms should be completed in advance to help our medical team prepare for your pet's visit. A grace period of __ minutes will be granted for unforeseen delays that you may encounter while traveling to our hospital. If you arrive more than __ minutes late for an appointment, we will offer options of being seen as a work-in, day admission, or rescheduled as our schedule permits. We strive to ensure clients and patients are seen in a timely manner and appreciate your on-time arrival. Clients who have three or more late arrivals for appointments cannot schedule future appointments and will only be seen as emergencies or day admissions. Additional fees will apply.

Cancellation Policy: If you need to cancel an appointment, call us at least 24 hours in advance. If you reach us after business hours, please leave a voicemail. Early cancellation will allow another patient access to timely care.

No-Show Policy: A no-show is a client who misses an appointment without cancelling it. Missed appointments will require prepayment of the exam fee when rescheduling. When this prepaid appointment is kept, the fee will be applied to the invoice. If the prepaid appointment is not kept, the fee

will be forfeited. If you miss three appointments, we will terminate of our veterinary-client-patient relationship.

We appreciate the opportunity to care for your pet and share these expectations upfront so we can best serve our clients and patients with timely care.

3ʳᵈ confirmation, 5 days ahead:

Same message for existing and new clients
TEXT THIS: <Pet name>'s <visit name> is just 5 days away! This is your last chance to modify your appointment. We will send your pet's intake form in a few days to get health information to help our medical team prepare for your pet's appointment. Please select a button below: <Confirm> <Reschedule>

EMAIL THIS:
Subject line: Please confirm your pet's appt ✅
Email message: <Pet name>'s <visit name> is just 5 days away! This is your last chance to modify your appointment.

P.S. Be on the lookout 👀 for your pet's intake form in a few days. You will answer health questions about <pet name> to help our medical team prepare for your appointment.

Please select a button below:

Confirm   **Reschedule**

4ᵗʰ confirmation, 2 days ahead:

Existing Clients
TEXT THIS: We look forward to seeing <pet name> at <date, time>. Complete your pet's intake form by X pm TOMORROW to help our medical team prepare for your pet's appointment. For your <visit name>, bring a stool sample 💩 that is fresh within __ hours. Reply or call us at <phone> with any last-minute questions. <Attachment: Intake form based on reason for visit>

EMAIL THIS:
Subject line: Complete form now for your pet's appt 💁
Email message: We're getting ready for <pet name>'s <visit name> on <date, time>. To prepare for your appointment, please:
1. Complete your pet's intake form by X pm TOMORROW to help our medical team prepare for your pet's appointment on <date>. We need this information at least 24 hours in advance so the doctor may review it.
2. Bring a stool sample 💩 that is fresh within __ hours to the appointment.

Reply or call us at <phone> with any last-minute questions. We look forward to seeing you and <pet name>!
<Attachment: Intake form based on reason for visit>

New Clients
TEXT THIS: We're excited to meet you and <pet name> at <date, time>. Complete your pet's intake form by X pm TOMORROW to help our medical team prepare for your pet's appointment. Email adoption or medical records to records@yourvet.com. For your <visit name>, bring a stool sample 💩 that is fresh within __ hours. Reply or call us at <phone> with any last-minute questions. <Attachment: New client intake form>

EMAIL THIS:
Subject line: Complete form now for your pet's appt 💁

Email message: We're getting ready for <pet name>'s <visit name> on <date, time>. To prepare for your appointment, please:
1. Complete your pet's <u>intake form</u> by X pm TOMORROW to help our medical team prepare for your pet's appointment on <date>. We need this information at least 24 hours in advance so the doctor may review it.
2. Email adoption or medical records to records@yourvet.com.
3. Bring a stool sample 💩 that is fresh within __ hours to the appointment.

Reply or call us at <phone> with any last-minute questions. We look forward to meeting you and <pet name> tomorrow!
<Attachment: New client intake form>

1 day before: Call if clients haven't confirmed and/or returned forms. SAY THIS: *"We have reserved an appointment for <pet name> at <time, date>. We are experiencing increased appointment requests and have other patients on a waiting list. We need your confirmation and online form today by <time> or <pet name>'s appointment will be released to another patient in need. Please text/email/call us with questions."*

IMPORTANT: Because 67% of people don't listen to voicemails, send texts as backup communication. At the end of the business day, send texts and/or emails to inform non-compliant clients that their appointments have been cancelled.

Cancellation text: We regret that we have not received your confirmation and/or online form, which is required to guarantee your pet's appointment. Your appointment on <time, date> has been released to another patient in need. Please click to reschedule. <button>

Cancellation email:
Subject line: Your pet's appt has been cancelled ❗ Please rebook
Email message: We regret that we have not received your confirmation and/or online form, which is required to guarantee your pet's appointment. Your appointment on <time, date> has been released to another patient in need. Please click to reschedule. <button>

5ᵗʰ confirmation, day of appointment:

<u>Existing Clients</u>
TEXT THIS: We're ready to see <pet name> today for <visit name> at <time>. Bring a stool sample 💩 that is fresh within __ hours. If you haven't already, complete your pet's <u>intake form</u> that we sent yesterday. See you today! <Attachment: Intake form based on reason for visit>

EMAIL THIS:
Subject line: We will see you and your pet today 🏥
Email message: We're ready to see <pet name> today for <visit name> at <time>.
1. Bring a stool sample 💩 that is fresh within __ hours.
2. If you haven't already, complete your pet's <u>intake form</u> that we sent yesterday. We've also attached it here.
See you soon! <Attachment: Intake form based on reason for visit>

<u>New Clients</u>
TEXT THIS: We're ready to see <pet name> today for <visit name> at <time>. Bring a stool sample 💩 that is fresh within __ hours. Get <u>driving directions</u>. See you today!

EMAIL THIS:
Subject line: We are excited to meet you and your pet today! 🏥

Email message: We're ready to see <pet name> today for <visit name> at <time>.
1. Bring a stool sample 💩 that is fresh within __ hours.
2. Get driving directions.

See you today!

Prevent late arrivals

When one client runs late, you get multiple consequences:
1) Your team looks disorganized.
2) Late arrivals ruin your schedule.
3) Your medical team feels rushed.

Have a late policy. While clients may occasionally show up late, habitually tardy clients disrespect your time and team. Just as your hospital has a financial policy, have a late policy that holds clients accountable and sets expectations. Add the policy to your new client registration, online forms, and online or app scheduling tools. (See page 15 for a sample late arrival policy.)

Give a gentle warning on the first offense. SAY THIS: *"I understand that you were 15 minutes late for your appointment today. We want you and your pet to benefit from the full exam time with our medical team. To best serve you, please be on time for future appointments. We send confirmations upon booking and reminders before your exam. Let me confirm that we have your correct cell number for texts and your email. We appreciate your timeliness so we can give all patients the time they need."*

Put alerts in your practice-management software. Track the number of times that a client is tardy to identify when a one-time occurrence becomes a chronic behavior. I advise having a "three strikes and you're out" policy. Forgive a first offense. You've been unexpectedly delayed in traffic, too. When you see three late arrivals within one year, decide whether to keep or end the client relationship. Allowing the chronic behavior to continue is your fault.

Send a text when a client is 5 minutes late. Clients should follow laws about not texting while driving.

TEXT THIS: We expected to see you at <time> for <pet name>'s appointment. Reply YES and your expected arrival time if you're on the way, or RS to reschedule.

If the client replies, "I'll be there in 5 minutes," don't make promises in your response. Five minutes could end up being 20.

TEXT THIS: Thanks for letting us know. Drive carefully. See you soon.

Once the client walks in the door, look at options based on your schedule in that moment. Never punish on-time clients by letting a late client cut in front of them.

Option 1: See the patient. If most of the exam time remains such as 20 of 30 minutes, alert the technician and veterinarian so they may start the appointment and keep the schedule on track.

Option 2: See another doctor if one is available. SAY THIS: *"Dr. <Name 1> has started the next appointment. Dr. <Name 2> will see you now."* This option may be a rare choice with current appointment demands.

Option 3: Ask if the client can wait and be seen as a work-in appointment. SAY THIS: *"Dr. <Name> has started the next appointment. We want <pet name> to get the care it needs. We*

will see <pet name> as soon as the first doctor becomes available, which may be XX or more minutes. Are you able to wait, or do you prefer to reschedule?"

Option 4: Offer to reschedule. Use the yes-or-yes technique, focusing on what you can do. SAY THIS: *"Our next available appointment are <date, time 1> and <date, time 2>. Which do you prefer?"*

Option 5: Offer a day admission appointment. SAY THIS: *"Although you arrived too late and missed your appointment, we can admit your pet to the hospital. A technician will get your pet's vital signs and ask history questions. A veterinarian will examine your pet during the day, and then contact you about next steps. We will provide a treatment plan and get your approval before delivering care. You may pick up your pet between 4 and 6 p.m. Because we will provide nursing care for your pet throughout the day, there is an additional day admission fee of $__. Shall we admit your pet to the hospital, or do you prefer to reschedule?"*

Always improve the scheduling process. You can maximize efficiency multiple ways in your veterinary practice. If you notice your schedule is too full or too empty, raise the issue at your next staff meeting. Discuss which days have more inconsistent schedules. Identifying trends will help you tackle scheduling mishaps head-on. Getting everyone's input will get buy-in and support of improvements. Remember: Data is king.

Which goals will you implement from this training?

1. _____
2. _____
3. _____

Facilitator's Guide: Scheduling Mastery

Choose a facilitator to lead your team's discussion. Create plans to implement goals you learned in this training program.

1. Which appointment types and how many will you pre-block in doctors' daily schedules?

_____
_____
_____
_____
_____
_____

2. Which strategies will you implement to prevent no-shows?

_____
_____
_____
_____
_____
_____

3. How will you manage late arriving clients?

_____
_____
_____
_____
_____
_____

4. How will you improve confirmations that prevent no-shows and provide pre-appointment instructions?

_____
_____
_____
_____
_____
_____

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