W

hile it is true that gas prices, grocery prices, etc. are affecting each family's total disposable income, there still are patients who are ready for orthodontic treatment and can manage payments for that care. Rather than focusing all your effort on getting more New Patients I believe you need to look to the patients with whom you have already established a relationship. These would include New Patients who have postponed treatment or missed their initial evaluation, as well as Pre-treatment Recall and Pre Phase Two Interim observations who have fallen out of the recall system.

Re-approach Your Never Treated

If you have a group of patients who were seen for their initial exam and had treatment recommended but never scheduled, I would follow up with the letter at left (Example #1) for just one more contact. This letter would only be sent to patients under the age of 15. (Anyone over that age is more likely to have started the work elsewhere and adult conversion tends to be so poor, I would not chase after them.)

I had one office send this out, and they had 26 starts result from the mailing.

To contact those patients who never started treatment, use the following subgroup:

Patients Age less than or equal to 15 AND Patient Status equal to Never Treated (or equivalent) AND Last Kept Procedure equal to any exam procedure AND Last Kept Date range with the last two years.

See Example #1, shown at left.

Recall Your Pre-Treatment Observation

A different letter can be used for the pre-treatment observation patients who have no appointment scheduled, are past due on their recall, or have no recall date.

Subgroup A:

Next Appointment not greater than or equal to today AND Next Recall equals No AND Patient Status equal to Pre-Tx (or equivalent).

Subgroup B (overdue recalls):

Next Recall equal to Yes AND Next Date less than (i.e., prior to) three months ago AND Patient Status equal to Pre-Tx (or equivalent).

See Example #2, shown on next page.

Reprinted from
The Newsletter for Members and Friends of Ortho2
July 2008 - Volume 26 Issue 3
Recall Your Phase II Observation

The Pre-Phase Two observation letter (Example #3) is simply adapted from the Example #2 letter.

Subgroup A:
- Next Appointment not greater than or equal to today AND
- Next Recall equals No AND
- Patient Status equal to Pre-Phase II (or equivalent).

Subgroup B (overdue recalls):
- Next Recall equal to Yes AND
- Next Date less than (i.e., prior to) three months ago AND
- Patient Status equal to Pre-Phase II (or equivalent).

Contact Missed New Patient Evaluations

Just because a patient misses one New Patient Evaluation does not necessarily mean that they cannot become a valuable patient in your practice. It is worth one more effort to reach them. Use the following subgroup:
- Patient Status equal to New Patient (or equivalent) AND
- Last Missed Procedure equal to any exam procedure AND
- Last Missed Date range for the period you are working on.

If you've never re-approached them you may want to include the status of Never Treated and run your dates for the entire last year. You would use the same letter as Example #1, just rephrase for a missed exam. At the same time you send that letter you may want to send a letter to the family dentist: See Example #4, at left.

With a few simple letters you can reach out to patients who are all potential production for the practice. By keeping the family dentist informed throughout this process you can demonstrate that you have thoroughly followed up with the patients that they have entrusted to your care.

About the Author

Over 17 years of hands-on experience in the industry and a warm teaching style have allowed Natalie Beaton to guide orthodontic teams around the country to greater practice success. For a consultant’s insight at a fraction of the cost, she can use VP Remote to access and analyze your practice systems. She can be reached at joyfulchange@comcast.net or (804) 608-0780. Her website is www.joyfulchange.net.