



ORTHO2

# How to Bring Patients into Your Practice in Today's Economy

by **Natalie Beaton**

**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.

Dear «resparty\_greeting»,

We have found that there are many reasons that families may choose to delay the start of orthodontic care. When «patient\_nick\_name» was last seen on «appointment\_last\_kept\_date», you decided to postpone treatment at that time. We are sending this letter as a way to simply let you know there is no need to feel uncomfortable about that delay and we would be delighted to see you again if that would be helpful!

If circumstances have changed, Dr. Orthodontist can:

- Re-evaluate the areas of orthodontic concerns
- Discuss the benefits that «patient\_nick\_name» would receive from orthodontic care
- Discuss alternative orthodontic treatment
- Discuss alternative payment options

As always, a re-evaluation will be done as a courtesy to you and your family dentist and there is no cost to you. This gives you the opportunity to explore the role that orthodontics could play in your overall dental health before making any financial commitment.

Dr. Orthodontist recognizes the financial investment that orthodontics involves and continue to add new payment options to make orthodontics financially comfortable for all interested patients. If the various financial arrangements we discussed previously, did not meet your financial needs please feel free to let us know what might be more financially comfortable for you. In addition, please let us know if there might be new insurance benefits you would like us to verify so that they can be factored into any financial options discussed.

If we can be of service, we will look forward to speaking to you soon!

Sincerely,  
Your Name

Example 1

## 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.

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Dear «resparty\_greeting»,

It has been some time since we have been able to visit with you and your «patient\_son\_daughter», «patient\_nick\_name»; we were hoping to hear from you so that we could schedule an appointment for «patient\_him\_her1». We have made several attempts to reach you but have been unsuccessful in speaking with you directly. Our plan in «patient\_nick\_name»'s case is to continue to monitor «patient\_his\_her1» dental growth and development. The following are some common questions and answers regarding this pre-treatment observation stage.

#### ANSWERS TO SOME COMMON QUESTIONS

##### When should we schedule our next visit?

At this point, the appointment can be scheduled immediately.

##### Why are follow up visits important?

These follow up visits allow us to monitor...

etc.

Please give the office a call at your convenience and we will be happy to schedule an appointment for «patient\_nick\_name». If we do not hear from you we will place «patient\_nick\_name» on a recall for twelve months from now and try again at that time.

Sincerely,  
Scheduling Coordinator

cc: «dentist\_full\_name»

#### Example 2

Dear «resparty\_greeting»,

It has been some time since we have been able to visit with you and «patient\_nick\_name»; we were hoping to hear from you so that we could schedule an appointment for «patient\_him\_her1». We have made several attempts to reach you but have been unsuccessful in speaking with you directly.

As we discussed at the start of «patient\_nick\_name»'s orthodontic treatment, once Phase One orthodontic treatment was completed it is important that «patient\_nick\_name» be seen regularly so that we have the opportunity to monitor «patient\_his\_her1» dental growth and development for any future Phase Two orthodontic needs. «patient\_nick\_name» was last seen on «appointment\_last\_kept\_date».

Please give the office a call at your convenience and we will be happy to schedule an appointment so «patient\_nick\_name» can be evaluated. If there have been circumstances that are preventing you from scheduling, please call the office so that we can discuss how best to proceed. We look forward to hearing from you soon.

etc.

Dear «dentist\_first\_name»,

We want to thank you for referring «patient\_full\_name» to our office for an orthodontic evaluation. We had scheduled an extensive evaluation exam for «patient\_first\_name» on «appointment\_last\_missed\_date». Unfortunately «patient\_first\_name» failed that appointment and as of this time, the appointment has not been rescheduled.

We wanted to keep you informed of «patient\_first\_name»'s status with our office so you can update your records in regards to orthodontic treatment. We have left instructions for «patient\_first\_name» to call us at the earliest convenience to reschedule, if still interested in pursuing an orthodontic evaluation.

Feel free to call me with any questions or concerns.

Sincerely,  
Your Name

#### Example 4

#### Example 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.