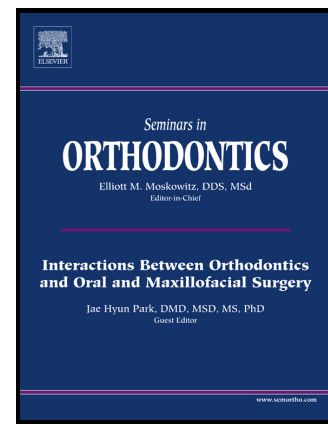


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Scheduling and time management in orthodontic offices

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**Scheduling and Time Management in Orthodontic Offices**

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Abstract: Scheduling and Time Management in Orthodontic offices is a crucial part of Practice Management. This article has delved into the various aspects of scheduling and time management and suggested certain protocols for smooth functioning of our offices. The authors believe that this would provide long term productivity and sustainability to our practices.

Keywords : Scheduling Appointments, Time Management, Orthodontic Offices

“I am definitely going to take a course on time management... just as soon as I can work it into my schedule”- Louis E. Boone

Excellent clinical results, efficacy of treatment procedures and satisfaction of patients as well as the treating doctor are the primary goals of any clinical practice. As professionals, doctors also need to consider any practice as a business. Needless to say, the most important asset of any business would be the doctor himself. The doctor has various assets such as his knowledge, training, clinical skills, clinical acumen and soft skills to make a practice successful as a business model. One needs to understand that above all the most important asset the doctor many times ignores or falls short off is his/her time. The time the doctor spends in more productive work will naturally transpire into more success clinically as well as financially. There can be no doubt that the success of any dental practice depends on how well the scheduling of appointments for patients is managed on a day-to-day basis. It also depends on how well the office can maximize the doctor and associate's times so that he/she/they can deliver better dental care to his/her/their patients. It is but natural that working of different dental offices will depend mainly on the demographics as well as individual likes and dislikes.

A structured schedule and time management protocol is a necessity for all offices irrespective of their location and individual variations in thought processes. The goal of any

practice should focus on being maximally effective and productive by increasing work efficiency. This article is an attempt to set forth some basic guidelines for smooth functioning of an orthodontic office and maximizing the utilization of the time available to the Orthodontist and his staff in delivering the best possible orthodontic care on a daily basis.

At the outset one should always ask oneself how he or she perceives their practice. What type of practice do they envisage in the short as well as the long term. Practices across the world vary due to the demographics involved as well as the socioeconomic issues facing their respective countries. It is impossible to compare practices in the developed and developing countries. Personnel issues, economic issues, availability issues, mindset issues, hiring issues, fee structures, etc., vastly differ from country to country and even city-to-city in the developing countries. It would be a futile exercise by the authors', to even try to make an attempt to compare a practice in a country in Asia to say in Europe or the United States. But whatever the type of practice in any country, scheduling and time management in our offices should not vary much. There will be variability in the number of hours a practice functions in a day according to the school and office timings of our patients. There will also be variability in way of how many days the practice functions. In some practices it is a five-day week while in some it is a six-day week. Also many orthodontists have satellite offices. Naturally the scheduling will vary accordingly. Be that as it may, any practice to be successful requires giving priority to patient appointment scheduling and management of the doctor's as well as the patient's time.

The environment the practice functions should be stress free. None of the old as well as the new practice building/marketing tools is as effective as *"appropriate management of your appointments"*. The office must always make sure that the patient does not have to wait and is welcomed into the operatory on his/her scheduled allotted time. The authors have found this to be a tremendous practice booster.

The appointment system should be such that the flow of patients is smooth with no overlap or overcrowding. Proper scheduling helps the office in delivering prompt service to their

patients, accommodate emergencies, avoid non-productive time lapses and improve patient relations. It also allows one to mentally prepare for each day and to pace oneself throughout the day without getting fatigued.<sup>1</sup>

In a newly setup practice, it is a good idea to prepare the schedule of working and timing of appointments according to the convenience of the patients. Once the practice is established, the office can take the liberty of gradually molding the mindset of its patients to cater to the convenience of the doctor/s and the office staff regarding the scheduling of the appointments.

Scheduling and time management encompass not only patient appointments but also determining the preparation time required for each procedure as well as the time taken for the procedure and the post procedure time. It is a good idea to use a stopwatch to measure the actual time taken for a procedure. This can be done for all time consuming procedures. The working hours of each day could then be divided into 15-minute slots. The preparation time required for sanitization and disinfection of the operatories and sterilization of the instruments can also be added to the procedure time. Extra sets of instruments, which can be sterilized and kept ready at the beginning of the day, and well-trained chair-side assistants who can prepare the operatory for the next patient are good investments in reducing the preparation time. Post procedure time, which may include giving instructions about various aspects of treatment, hygiene, medications, etc., also needs to be considered. It is a good idea to have dedicated space for post procedure instructions. This will save valuable chair side time.

A list of these procedures and timings could be kept at the front office desk. This will help the office front office personnel (receptionist) to arrange the daily schedule appropriately. It is always beneficial if this job is delegated to a well-trained receptionist or treatment coordinator.<sup>1</sup>

Objectives of a daily appointment schedule:

1. Respecting the patient's and their parent's time.
2. Streamlining the patient flow in the office.

3. Increasing productivity in the office by avoiding unnecessary loss of time.
4. Setting aside most effective hours of the day for more intricate and time-consuming procedures, e.g. Microscrew placements, bonding procedures, etc.
5. Giving an opportunity to prioritize workload.
6. Keeping dedicated appointment slots for emergencies and/or impromptu consultations.
7. Properly sequencing follow up appointments.
8. Streamlining of cancellations.

It is always advisable to allocate the strenuous work appointments in the earlier half of the day, as the doctors and staff are fresh. Consultations, record preparations, checkups could and should be scheduled in the latter half of the day. This ensures that the doctors and staff give their best clinical output for effective and quality care to their patients.

Maintaining an appointment schedule is primarily the responsibility of the front office personnel, but the doctor should also be actively involved in this process. The front office personnel should be efficient enough to coordinate with the doctor concerned while preparing the doctors' daily schedule. In the yester years maintaining an appointment book was the norm. In today's highly techno savvy world, there is an abundance of practice management software, which also includes appointment scheduling as one of their services. In many ways this has made life simpler for the doctor and staff, but in many ways it has also complicated certain aspects of scheduling of appointments. These software's have a facility wherein the patient can book his/her appointment online. This may be convenient for the patient but makes the appointment schedule of the office vulnerable to the choice of the patient. The office should always govern the appointment schedule. Online facility could be of use only for emergencies or new consults. The office could program the software in such a manner.

The authors still believe in the good old-fashioned system of an appointment book along with the appointment scheduling facility of the practice management software. This ensures a safe back up system in case of software glitches. It is recommended that

appointment confirmations could be sent via messaging services twenty-four hours in advance and for some important procedures or patients, these reminders could be conveyed by a personal telephone call by the front office. The reminder should be worded in a manner, which is welcoming and personalized, e.g. "We are looking forward to seeing you".

Cancellations and missed appointments lead to lower productivity as well as loss of revenue. These two business demons have always been a source of major irritation and disappointment to the doctor and his/her staff.<sup>1</sup> Reminders play a major part in decreasing "no shows". But there will still be some last minute missed appointments despite the office prescheduling or sending reminders.

A good way to utilize the time made available by a missed appointment is to have an *"appointment request list"*. There will always be patients who have missed their previous appointments or who want an early appointment. These could be called in by the front office if a "no show" or reschedule is on the cards.

The office should always value the patients' and their parents' time and a good way to go about this aspect of practice management is to streamline appointments, show some rescheduling flexibility at appropriate times and handle unfortunate cancellations or no shows positively and with candor without upsetting the patients or their parents.

The authors believe that every orthodontic office & all its personnel should follow Covey's four quadrants of time management.<sup>2</sup> they definitely would be very useful and improve one's practice profile.

The Covey time management grid is an effective method of organizing your priorities. It differentiates between activities that are important and those that are urgent. According to Covey -

- **Important** activities have an outcome that leads to the achievement of your goals, whether these are professional or personal.
- **Urgent** activities demand immediate attention, and are often associated with the achievement of someone else's goals.

Inevitably, there is a tendency to focus on things that are urgent – and often the urgent things are also important.

Stephen Covey's approach to time management is to create time to focus on important things *before* they become urgent. Sometimes this just means doing things earlier. The real skill is to commit time to processes that enable you to do things more quickly or more easily, or ensure that they get done automatically.

Sample activities are listed for each of the quadrants. As you study the quadrants, notice which one most of your activities fall into. (Table 1)

In order to fully evaluate your own office, it's important to make a master list of as many of your daily office activities that you can think of, and place them in the corresponding quadrant. In which quadrant do the office doctors and staff spend most of their time each day?

**In order to make positive change in your daily schedule, you need to aim for spending the most time in Quadrant 2.**

By devoting a good deal of time to that area, you will naturally eliminate many of the crises that tend to happen in Quadrant 1, as well as providing the office and all personnel with more solid direction, which in turn will help eliminate spending excess time in either Quadrant 3 or 4.<sup>2</sup> (Table 2)

Covey uses a metaphor of filling a bucket with rocks, pebbles and sand to represent activities of declining importance. Very often if you commit specific times for the important activities you will also find time to fit in the less important ones.<sup>2</sup> (Table 3)

From the scheduling perspective, Covey's principles could be implemented in the following manner -

The clinical work can be classified in the following categories:

1. Urgent and important
2. Urgent but not important
3. Important but not urgent



4. Neither urgent nor important

Based on the above categories the work can be done as follows:

1. Urgent and important work will be done by the Consultant
2. Urgent but not important can be delegated to associate doctors
3. Important but not urgent can be done by the Consultant during his leisure time
4. Neither urgent nor important work can be delegated to chair-side assistants

Another very important aspect of clinical practice is *"managing emergencies"*.

Managing emergencies: Emergency or unplanned visits of patients in orthodontic offices is a routine phenomenon. The office administration and staff should be well trained and prepared for such type of emergencies.

The emergency clinical work can be classified as -

1. Urgent and important
  - a. Breakages of auxiliaries such as fixed functional appliances
  - b. Broken fixed expanders
  - c. Complications related to microscrews
  - d. Loose RPEs
2. Urgent but not important
  - a. Loose bands and/or brackets
  - b. Shifted and/or sharp arch wires
  - c. Broken bonded retainers

Based on these parameters, the doctor can take decisions whether the work needs to be done by him/her or to be delegated to the associate.

The office should also have a system in place for sending appointment reminders to the patients. Our monthly appointments or six weekly appointments are easy to forget and so it is always a nice gesture on the part of the office to send reminders telephonically or by messaging services. This too can be a very powerful practice building tool.

All said and done, every office has its own work philosophy and work ethics.

But it is mandatory that certain basic guidelines be followed for the practice to build a stellar image and also be productive financially.

#### Conclusion:

Irrespective of the demographics, the office appointment schedule of the patients and time management of the doctor, associates and staff should be stress free and the atmosphere in the office always pleasant. This also makes the patients feel welcome and comfortable. One should look at long term practice building goals and should not get overwhelmed by short term financial gains. This would make the practice sustainable for a long time.

#### References:

1. Starting your Dental Practice: A Complete Guide. Practice Management Series. American Dental Association 2001.
2. Brefigroup; Releasing human potential. [brefigroup.co.uk](http://www.brefigroup.co.uk) [Homepage on internet] available at <http://www.brefigroup.co.uk/acrobat/quadrnts.pdf>

|               | URGENT                                                                                                                                                                                                                               | NOT URGENT                                                                                                                                                                                        |
|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| IMPORTANT     | QUADRANT 1                                                                                                                                                                                                                           | QUADRANT 2                                                                                                                                                                                        |
|               | <b>"NECESSITY"</b>                                                                                                                                                                                                                   | <b>"QUALITY &amp; PERSONAL LEADERSHIP"</b>                                                                                                                                                        |
|               | Your Key Action: <b>"MANAGE"</b>                                                                                                                                                                                                     | Your Key Action: <b>"FOCUS"</b>                                                                                                                                                                   |
|               | <b>Common Activities</b>                                                                                                                                                                                                             | <b>Common Activities</b>                                                                                                                                                                          |
|               | <ul style="list-style-type: none"> <li>– Crises</li> <li>– Deadline-driven activities</li> <li>– Medical Emergencies</li> <li>– Other "true" emergencies</li> <li>– Pressing problems</li> <li>– Last minute preparations</li> </ul> | <ul style="list-style-type: none"> <li>– Preparation &amp; planning</li> <li>– Values clarification</li> <li>– Empowerment</li> <li>– Relationship-building</li> <li>– True recreation</li> </ul> |
| NOT IMPORTANT | QUADRANT 3                                                                                                                                                                                                                           | QUADRANT 4                                                                                                                                                                                        |
|               | <b>"DECEPTION"</b>                                                                                                                                                                                                                   | <b>"WASTE"</b>                                                                                                                                                                                    |
|               | Your Key Action: <b>"USE CAUTION or AVOID"</b>                                                                                                                                                                                       | Your Key Action: <b>"AVOID"</b>                                                                                                                                                                   |
|               | <b>Common Activities</b>                                                                                                                                                                                                             | <b>Common Activities</b>                                                                                                                                                                          |
|               | <ul style="list-style-type: none"> <li>– Meeting other people's priorities &amp; expectations</li> <li>– Frequent interruptions: Most e-mails, some calls</li> <li>– Urgency masquerading as importance</li> </ul>                   | <ul style="list-style-type: none"> <li>– Escapist activities</li> <li>– Mindless tv-activities</li> <li>– Busy work</li> <li>– Junk mail</li> <li>– Some emails</li> <li>– Some calls</li> </ul>  |

Table 1: Adapted from Stephen Covey's "First things first" – Covey leadership Center, Inc ©

2003.

The time management matrix – activities

|               | Urgent                                                                                                                                                                                                                                               | Not Urgent                                                                                                                                                                                                                          |
|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Important     | <p><b>I</b></p> <p>ACTIVITIES • Crises</p> <ul style="list-style-type: none"> <li>• Pressing problems</li> <li>• Deadline-driven projects</li> </ul>                                                                                                 | <p><b>II</b></p> <p>ACTIVITIES</p> <ul style="list-style-type: none"> <li>• Prevention, capability improvement</li> <li>• Relationship building</li> <li>• Recognising new opportunities</li> <li>• Planning, recreation</li> </ul> |
| Not Important | <p><b>III</b></p> <p>ACTIVITIES</p> <ul style="list-style-type: none"> <li>• Interruptions, some callers</li> <li>• Some mail, some reports</li> <li>• Some meetings</li> <li>• Proximate, pressing matters</li> <li>• Popular activities</li> </ul> | <p><b>IV</b></p> <p>ACTIVITIES</p> <ul style="list-style-type: none"> <li>• Trivia, busy work</li> <li>• Some mail</li> <li>• Some phone calls</li> <li>• Time wasters</li> <li>• Pleasant activities</li> </ul>                    |

Table 2: Based on *7 Habits of Highly Effective People*, Stephen Covey

The time management matrix – results

|                      | Urgent                                                                                                                                                                                                                                                                                                    | Not Urgent                                                                                                                                                                               |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Important</b>     | <p><b>I RESULTS</b></p> <ul style="list-style-type: none"> <li>• Stress</li> <li>• Burn-out               <ul style="list-style-type: none"> <li>• Crisis management</li> <li>• Always putting out fires</li> </ul> </li> </ul>                                                                           | <p><b>II RESULTS</b></p> <ul style="list-style-type: none"> <li>• Vision, perspective</li> <li>• Balance</li> <li>• Discipline</li> <li>• Control</li> <li>• Few crises</li> </ul>       |
| <b>Not Important</b> | <p><b>III RESULTS</b></p> <ul style="list-style-type: none"> <li>• Short term focus</li> <li>• Crisis management</li> <li>• Reputation - chameleon character</li> <li>• See goals and plans as worthless</li> <li>• Feel victimised, out of control</li> <li>• Shallow or broken relationships</li> </ul> | <p><b>IV RESULTS</b></p> <ul style="list-style-type: none"> <li>• Total irresponsibility</li> <li>• Fired from jobs</li> <li>• Dependent on others or institutions for basics</li> </ul> |

Table3: Based on *7 Habits of Highly Effective People*, Stephen Covey