



Dr. Dean C. Bellavia's

A~D~D~I~C~T your SCHEDULING Systems

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Create your Ideal Scheduling System

System's Responsible Persons: Doctor, Scheduling Design Coordinator (SDC) (name) _____

System's Analysis Person (who collects statistics): (name) _____

Realistic Analysis Time Frame: 2 weeks to collect all design statistics

Realistic Decision Time Frame: 2 weeks for DR & SDC to analyze the statistics and view the kit video or read Chapter-9

Realistic Design Time Frame: 2 months for SDC (with DR's & Team's input) to complete the Excel design

Realistic Implementation Time Frame: 1 week to build schedule on computer and set future Tx days

Realistic Critique Time Frame: 1 week at the end of each month for three months

Realistic Tweaking Time Frame: 2 weeks to modify and implement any scheduling design changes

Analyze:

☐ Whether your present schedule is either too hectic or boring and not as productive as it should be.

☐ Whether you are wasting doctor time and the assistants are not properly utilized

☐ **You will also need 12 MONTHS of the following statistics:**

☐ Your chosen minutes per appointment unit: ☐5 ☐10 ☐15 ☐20

☐ Typical number of Days/Week treating patients: _____

☐ Total number of Patient Tx Days: _____

☐ Total number of Patients seen (treated): _____

☐ Total number of New Patient Exams: _____

☐ Total number of Tx Consults: _____

☐ Total number of Recall patients: _____

☐ Total 1-unit _____ 2-unit _____ 3-unit _____ SOS/Emergency appointments

☐ Total Full + Ph-II DeBands _____

☐ Total number of Full/Ph-II comprehensive starts: _____

☐ Total number of Ph-I, Limited starts: _____

☐ Total number of Invisalign starts: _____

☐ Average hours/day treating patients (7.5, 8.0, etc.): _____

☐ **You will also need Yearly amounts of the following types of appointments:** (to act as a guide and proof against your final schedule design)

☐ Total 1-unit _____ 2-unit _____ 3-unit _____ Archwire appointments/year

☐ Total 1-unit _____ 2-unit _____ 3-unit _____ Active Check appointments/year

☐ Total 1-unit _____ 2-unit _____ 3-unit _____ Retention Check appointments/year

Decide:

☐ Who will be in charge of your schedule design

☐ Who will be responsible for collecting the statistics and when to collect them

☐ If using the "Scheduling Design & Tx Quality Control Kit" the doctor and responsible person need to view the Scheduling Design Video and decide in your Video Workbook, what to use and what not to use.

CHECK OFF THE BOXES OF THE STEPS YOU HAVE COMPLETED



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CHECK OFF THE BOXES OF THE STEPS YOU HAVE COMPLETED

Design:

- ☐ Use the "Scheduling Design & Tx Quality Control Kit", books, your consultant, or your own experiences to *design* your scheduling system.
- ☐ Document your Tx Mechanotherapy
- ☐ Document your appointments to provide that Tx Mechanotherapy
- ☐ Create your "composite" appointments to reduce the number of same type appointments (i.e., 2B, etc.)
- ☐ Create your "substitution" appointments for infrequently used appointments
- ☐ Calculate your appointment and staffing needs
- ☐ Create your schedule using the numbers of appointments you calculated
- ☐ Create your Appointment Code Reference Sheet to schedule patients to your appointments

Implement:

- ☐ Build your appointment codes and daily schedule design on your computer
- ☐ Choose a starting date to work with your schedule (4-8 weeks into the future)
- ☐ Use a Rotation Schedule and Vertical Calendar to maximize office utilization and availability

Critique:

- ☐ If using the Scheduling Design Kit, use your "Video Design Workbook" to make sure your design criteria are implemented.
- ☐ Has your schedule been properly installed on your computer? ☐Yes, ☐No: _____
- ☐ Are the TC and clinical team asking for the correct Appt. codes? ☐Yes, ☐No: _____
- ☐ Is the receptionist scheduling the Pt's in the proper time slots? ☐Yes, ☐No: _____
- ☐ Are there specific appointment codes you keep running out of? ☐Yes, ☐No: _____
- ☐ Are there specific appointment codes you have too many of? ☐Yes, ☐No: _____
- ☐ Are there other appointment codes you need, but don't exist? ☐Yes, ☐No: _____
- ☐ Are your "staffing combinations" (TC/RT, etc.) working out? ☐Yes, ☐No: _____
- ☐ Are your "composite" appointments working out? ☐Yes, ☐No: _____
- ☐ Are your "substitution" appointments working out? ☐Yes, ☐No: _____
- ☐ Are you getting out on time for lunch and the end of the day? ☐Yes, ☐No: _____
- ☐ Are you adequately staffed in each position (TC, DA, etc.)? ☐Yes, ☐Too Many, ☐Not Enough: _____
- ☐ What else goes wrong and why? _____

Tweak:

- ☐ Order the correct appointment codes using the appointment codes reference sheet
- ☐ Increase or decrease the number of various appointments per day
- ☐ Expand or combine appointments; expand or combine staff positions
- ☐ Clean up any of the problems noted in your critique above.

To better *control* your new schedule refer to the following pearls:

- ☐ SCH Pearl: **Staying on Schedule:** http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=167:staying-on-schedule&Itemid=766
- ☐ SCH Pearl: **Optimizing Your Daily Pt. Flow:** http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=170:optimizing-your-daily-patient-flow&Itemid=766
- ☐ SCH Pearl: **Maximizing Your Market Availability:** http://www.thebioengineeringco.com/index.php?option=com_k2&view=item&id=210:maximizing-your-patient-availability&Itemid=766