



The 'Book It In Now' System – How It Works

Introduction:

The 'Book It In' System remove the friction that traditional reminder systems create.

It is more efficient, has way higher compliance, clients prefer it and you get to maintain the control of the process.

Why does it work?

Under a traditional reminder system, a client is sent a communication asking them to book an appointment. The friction here is that the client must think of a time that suits and being so busy, puts it off. This often results in the appointment never being booked.

This system puts the responsibility of organising the time and advising the client in your hands, using the most responsive platform available.

The System:

The 'Book It In' System can be divided into three main parts – Setting the Appointment, Confirming the Appointment, and Checks and Balances to ensure that each part of the system works correctly. The exact form each component takes needs to be take account of the individual circumstances of the clinic; the following model is an example, which can be adapted as required.

1 - SETTING THE APPOINTMENT:

Key points:

- ***At checkout*** - briefly explain to client that an appointment will be set in the future at around the same time of day, and that they will be texted a week beforehand to check if the date and time still works for them.
- ***At checkout*** – go onto the clinic schedule and set an unconfirmed future appointment

More detail: After EACH appointment advise client that the next necessary appointment will be booked.

If it's for anything seven days or less in the future, simply get the owner to choose a time, and book it in as a confirmed appointment.

If the future appointment is greater than 7 days, set a day, and explain a text will be sent the week beforehand to see if the time still works or if they need to reschedule.

E.g. of script: "For next year's booster, we'll pop a date in the diary for when the vaccination is due, at around the same time. A week beforehand we'll text you a reminder, so you can accept it or re-schedule it to a more convenient time".

If it's a checkout for a surgery, the receptionist refers to a laminated checklist that gets clipped to each patient's take-home bag, as amongst other things, it details what future appointments need to be set, e.g. one-week post-surgery check, three month kidney recheck, and six month dental health check. Each is explained at discharge, and appointments are set accordingly.



So, any appointment more than a week away is scheduled as an orange coloured appointment (which is the colour code for an unconfirmed appointment). Therefore, when looking at the schedule, any appointments that are coloured anything other than orange are future appointments that have been confirmed, e.g. blue for vaccination, yellow for a revisit, etc.

2 - CONFIRMING THE APPOINTMENT:

Key points:

- One week before the unconfirmed appointment: ***text the client***
- Two days before any appointment that is still unconfirmed: ***phone the client***. If still not confirmed by the end of that day, move the appointment out of that timeslot on the schedule thus freeing it up so another person can book it.

More detail: Each day, check the appointment schedule seven days ahead for any orange (unconfirmed) appointments. A text is sent to these clients, inviting them to confirm or decline the appointment time.

So, if today is a Wednesday, look at the following Wednesday's schedule for any orange appointments, if today is a Thursday, look at next Thursday, and so on, with the exception being Friday, when both the following Friday AND Saturday need to be looked at.

The file for each of these clients with an orange appointment is then quickly checked to make sure the appointment time does actually correspond to a reminder they have for an appointment, and if all is correct, the client gets sent the following text:

Dear Ellen,

Your next vaccination appointment for Fluffy is currently scheduled for Friday 27.11.20. Please reply YES or NO, or call us on 8449 4011 to reschedule to a more suitable time. If not confirmed within 48 hours prior to the appointment, the appointment will be released.

Kind regards, You.

This text is to be saved as a template on the practice mobile so that only a few details need to be changed for each message.

It's also worth investing in a blue tooth keyboard to be used with the clinic mobile to speed up the process of sending the texts.

Incidentally, if a client doesn't have a mobile to send a text to, simply call them instead.

Clients' responses to the above text messages will come in on the clinic mobile throughout the day, so the mobile needs to be checked at least three times a day, so that orange future appointments can be updated accordingly to confirmed appointments in the schedule.

In practice, that means that clients

- reply with a 'YES', in which case change the colour code of their appointment on the schedule from orange to the relevant colour (e.g. blue for confirmed vaccination appointment); or
- reply with a 'NO' in which case there is no need to reply to the client, but make a note on the client's file that they have declined AND delete the orange appointment from the schedule; or



- ring us up to reschedule the appointment; or
- do not respond at all

If no response has been received from the client.

Each day check the schedule two full working days ahead, for any unconfirmed appointments and phone them.

It looks like this:

- On Mondays, phone to confirm Wednesday's unconfirmed appointments
- On Tuesdays, phone to confirm Thursday's and Saturday's unconfirmed appointments
- On Wednesdays, phone to confirm Friday's unconfirmed appointments
- On Thursdays, phone to confirm Monday's unconfirmed appointments
- On Fridays, phone to confirm Tuesday's unconfirmed appointments

If the client answers the phone - ask if they can come to the appointment, or whether they would like to re-schedule.

If a voicemail has to be left for client - the following is an example of a typical script:

“Hi Ellen, It's Kathryn calling from Port Adelaide Veterinary Clinic. I'm just ringing to confirm Fluff's appointment on Friday 27.11.20 at 3pm for a vaccination. Could you please call us on 8449 4011, to let us know if this appointment times works for you, or if you'd like to reschedule. If the appointment is not confirmed by 7pm tonight, we will release this timeslot. Thank you, have a nice day. Bye.”

If a voicemail has to be left, this is noted in two places – on the patient file, and also as a note on the day schedule adjacent to the orange appointment. Example of such a note would be: *Left v.m. on 23.3.20 for O to call back by 7pm tonight to confirm appointment scheduled for 25.3.20, otherwise appointment will be released.* Again, this can simply be copied and pasted to speed up this process.

At end of each day, if clients have not responded, the unconfirmed appointments are released for others to book.

The unconfirmed and non-responsive appointments are moved over to an unused column (e.g. the 'Notes' column) on the schedule together with the adjacent note containing the details of the voicemail that was previously left for the client. This then frees up the schedule for people who want to make an appointment.

That said, if a client does come to the clinic for an appointment which they did not confirm, do what can be done to fit them in, and gently point out that the text messages that are sent asks them to respond yes or no, so staff know if they are able to come or not.

If the clinic is fully booked and the client cannot be fitted in, politely let them know that they had been contacted twice (by text and voicemail) in which it was stated that if not confirmed, the timeslot would be released. As such, the appointment slot was released to another client who needed it, and the clinic is now fully booked, although we are more than happy to reschedule to another day/time that suits them.



3 - CHECKS & BALANCES:

Key points:

- The above text and phone calls tasks are included on the **reception daily checklist**
- Also on that checklist is an additional task, that of **checking the patient file for each day's completed appointments** to ensure an unconfirmed future appointment has indeed been set, and not overlooked.
- And finally, a **reminder report is run each fortnight** which prints out those reminder dates which fall in the coming fortnight, two weeks hence. Each reminder is checked to see that it has a corresponding confirmed or unconfirmed appointment, and if it doesn't, the client is contacted.

More detail: A key part of any system is a series of checks and balances to make sure that each of the processes that comprise the system is performed correctly.

In summary the processes on the Checklist for Reception are:

1. **Putting in an unconfirmed appointment for all future appointments that will be using this system.**
2. **Texting and calling clients.**
3. **Fortnightly reminders report which prints out reminders which fall in a 14-day period**

This report will be reviewed, and each client listed in the report will be categorised as:

- **No further action** because either a) an appointment has already been made by the client corresponding to the reminder, or b) there is an orange future reminder appointment on the schedule corresponding to the reminder.
- **Need a text reminder.** For example, 'Our records indicate that Fluffy needs vaccinating shortly, please contact us to book an appointment,'
- **Need a phone call** to establish whether the client still wishes to receive reminders (e.g. as indicated by a long period of inactivity on their file, e.g. due to them having moved away, or because they're going to another clinic, etc).

Implementation

Staff concerns:

- Before we implemented it, the staff were worried about how the clients would react to a change of system.
- Had a brainstorm as a team so we could identify any possible roadblocks or questions the clients may ask so we were all prepared
- One thing we discussed was how will the clients react to the new system – but it is important to remember – this is not new to clients.
 - Dentists, Doctors and Hairdressers often use a similar system.
 - The appointment is not "set in stone" it can be changed. It is merely setting the intent that an appointment is required and that this time may be suitable



Scripting was the next discussion –

We put a clear script in place to help all staff feel happy and comfortable in how to talk to the clients about it.

Script can be as follows:

“Fluffy has just had her vaccinations and will be due again in 1 years’ time. I am going to make a reminder appointment for you when this is due. I know you may not know an exact date and time that will be suitable in 1 year, but this appointment is only tentative. You will receive a text message reminder a week before the appointment to remind you, and if this time or date does not work, you are welcome to phone us and change it. If this time does work, you can simply reply yes to the text, and we will lock it in place.”

Do not fall into the trap of finding exact dates and times with the clients. Loosely define a time frame asking:

- Your appointment today (Tuesday) was after 5pm, will a Tuesday after 5pm possibly work in November next year?
- I know it is hard to know for sure, but are any days of the week or certain times (eg after work) that may be best for an appointment?

We found this was less time consuming for us, and making it seem ‘tentative’ but still important.

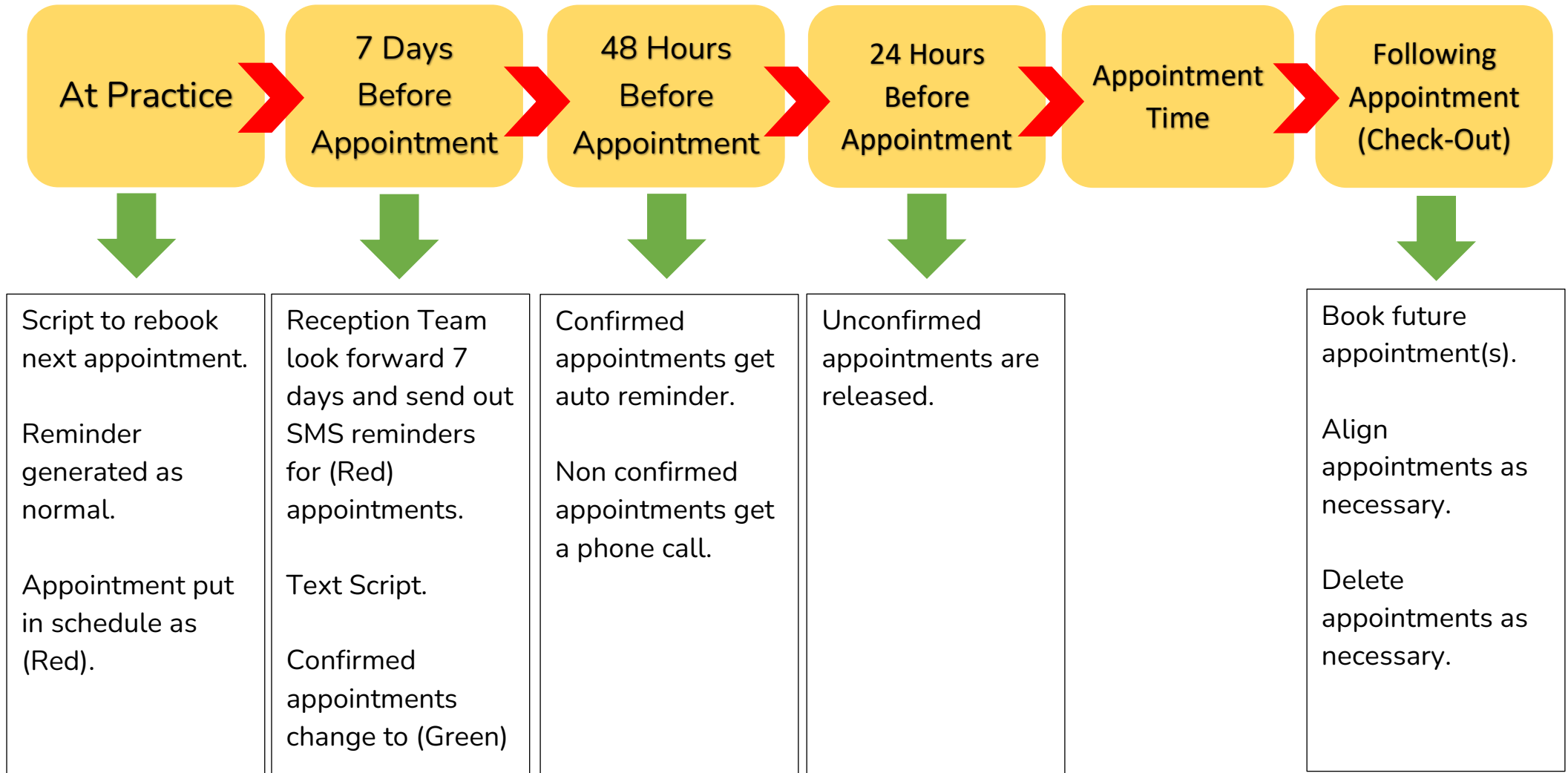
Finishing up the script: *“Great, reminder appointments are scheduled. Can we confirm the best contact number to receive the reminder message?”*

- Would it be theirs or partners mobile?
- Make sure to set that as primary contact number (and put in description their name and even ‘text msg reminders’)

How was the first year of implementing the change.

- First year was a bit clunky, with the hybrid of book it in and previous reminder systems.
- We printed off the reminder list as normal, went through it and marked which ones had future appointments made already. If yes, crossed off list. If not, sent the post card reminder out (this was the old system we were using).
- Realised the post cards were time consuming, so decided to change to a first reminder text message. This was saying “Fluffy is due for vax on 12/12/2020, contact the clinic on 84494011 and we will be happy to assist, otherwise find a suitable appointment on our online booking system”.
- Throughout the year, we went from a 10% to 20% to 50% to now approx. 95% future appts made. Backup system in place for those missed.
- If the clients were bringing in pets for other things during the year, we would look at their vaccinations and other reminders at the end of the appointment and ask them if we could make the future appts for those things as well, therefore speeding up the process of converting reminders over to the book it in system.
- If we need to make an appt for less than 1 week, tell clients that we won’t send a reminder message out.
 - Because we check and send 1 week prior not closer to the date.
 - Their appt time can be written on a card for them, or it prints out on their receipt.
 - If they still want a reminder message, make a note in the admin column for the staff to text them 1 day before to remind them.

The Book It In Timeline



Discharge for:	
Phone Discharge: YES /NO	Pay: In person /Over the phone
☐ Acct Billed Up ☐ Acct Checked	☐ VETPAY / ZIP
☐ Recheck in:	
☐ Start Meds:	
☐ Alternate Contact, if M/C implanted	
☐ Schedule & notify O if any future appt (DHC, EAG, etc)	
☐ Internal / External Sutures	☐ E-collar / T-Shirt
☐ Flea / Worms Found?	☐ Sheet re. cat re-introduction issues
Any Items from Home to return:	
Other:	
☐ Update Dental Score on Computer	

Discharge for:	
Phone Discharge: YES /NO	Pay: In person /Over the phone
☐ Acct Billed Up ☐ Acct Checked	☐ VETPAY / ZIP
☐ Recheck in:	
☐ Start Meds:	
☐ Alternate Contact, if M/C implanted	
☐ Schedule & notify O if any future appt (DHC, EAG, etc)	
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