



## Quick Tips for Scheduling and Managing Appointments

*This is an extra resource to go along with the original article:*  
[Avoiding the Dreaded Scheduling Snafu](#)

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Scheduling is an important factor when patients are considering practices—an easy experience can breed repeat customers, while one negative experience can deter them forever. Follow the tips below to help ensure you're delivering a positive one!

1. Prioritize having a dependable scheduling process.
2. Work as a team to estimate how long certain appointments, patients, or treatments take to properly block off time.
3. Be sure to factor in proper transition times and breaks.
4. Discover what your practice's sweet spot is—how many appointments can you have in a day without being overloaded or getting behind?
5. Enlist the help of a digital scheduling platform to streamline the process and save valuable employee time.
6. Make sure that easy scheduling, rescheduling, and cancelling is available for patients to reduce frustration and confusion.
7. Don't depend on patients hanging on to an appointment card—be sure a confirmation is delivered digitally (at least by email).
8. Reminders, reminders, reminders. Set up automatic phone, email, or text reminders (but not too many!).
9. DBATT: Don't Be Afraid to Text!
10. As always, be sure that all communication is HIPAA-compliant.
11. Be flexible. Hiccups happen, but having an agile and collaborative team will help keep things on course.

At the end of the day, no-shows will still occur no matter how precise your scheduling process may be, so don't sweat the small stuff. Just be sure to mark down when a patient misses an

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appointment so you can be sure to reach out to them to reschedule, or make a note in their file for the future