

## Patients who have cancelled their membership

It is inevitable that there will have been cancellations over the past few months due to COVID-19 as patients have not been able to access dental service and, understandably, are trying to save money.

As practices start to open, there will be a lot to do, including prioritising appointments for those patients most in need or emergency care; however, another priority should be to start the process of re-engaging with those patients who cancelled their membership. Do not just presume that they are still going to contact the practice to arrange an appointment and re-join your membership; you do need to contact them, whether this be by letter or by picking up the phone to call them and Practice Plan are here to help you with a short guide:

### How do I find out who has cancelled?

The first task is to find out how many patients have cancelled over the last few months and you can easily access this information within Online Services. You can even export the list so you can work through this list in your own time and make comments. Here is a simple guide to finding your cancelled patients within Online Services:

### Tracking patients who have cancelled their plan

It is more important than ever to keep track of the patients who are cancelling their plans. Some will call the practice directly, which will give you the opportunity to have a conversation with them about options available, but others may just cancel directly with our office or by cancelling their Direct Debit with their bank. Therefore, you need to be checking your online services to keep on top of these and have an action plan to follow them up. If you're not sure how to do this, we've included instructions below.

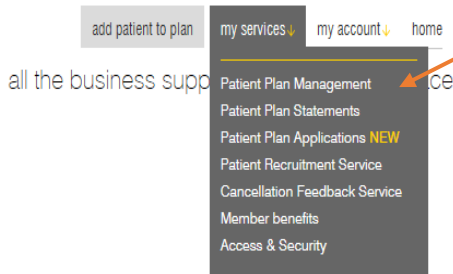
### How to track cancelled patients via Online services

- Log in to Online Services at [onlineservices.practiceplan.co.uk](https://onlineservices.practiceplan.co.uk)
- Go to **my services**, then click **Patient Plan Management** from the drop-down box.

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Log in

Thank you for logging in.



- Click on **Patient information**

# Patient Plan Mar

**Patient Plan Management**

- Statements
- Patient Search
- Patient Information
- Business Information
- Change Requests
- Agreement Cut Off Dates
- Help and Support

Welcome to your Patient Pla

Here you can gain access to all of your menu is your main navigation tool when activity, your members and their status

Please note, if the access rights for you of this service, for example, the statem to the person with 'Owner' or 'Admin' rig

**Latest News**

16/03/2020 **Your statements ;**  
The March statement i  
made on 18th of each

- Click on **Patients by Category:**

Patients Pending Cancellation

All Patients

Patients Alphabetical

Patients in Query **1**

Patients by Category

Birthdays Soon

Business Information

Change Requests

Agreement Cut Off Dates

Help and Support

**Latest News**

16/03/2020 **Your**  
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made

- Click on **Leavers:**

Patients in Query **1**

Patients by Category ^

Joiners

Leavers

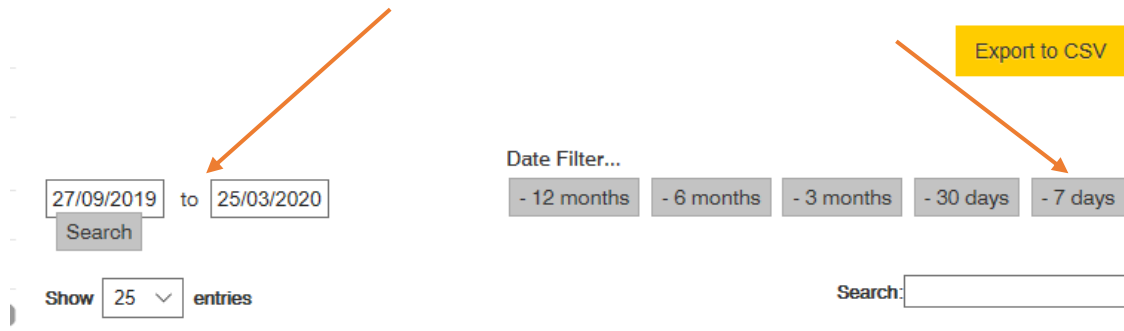
Added Today

First Time Payers

Recent Change of Plan

- Select a **pre-set date filters**

This will then give you a list of patients who have cancelled within the last week / month / 3 months, etc. You can also choose a specific date range by choosing a from and to date which is on the left-hand side of the screen.



You should now see a full list of patients who have cancelled their plan membership as the sample below:

Patient Ref	Surname	Forename	Dentist Name	Status	Payer Deceased	End Date
12345	Smith	John	Dr. John Smith	Cancelled		24/03/2020
12346	Lee	John	Dr. John Smith	Cancelled		24/03/2020
12347	White	John	Dr. John Smith	Cancelled		19/03/2020
12348	Black	John	Dr. John Smith	Cancelled		19/03/2020
12349	Green	John	Dr. John Smith	Cancelled		25/03/2020
12350	Blue	John	Dr. John Smith	Cancelled		25/03/2020
12351	Yellow	John	Dr. John Smith	Cancelled		23/03/2020
12352	Purple	John	Dr. John Smith	Cancelled		23/03/2020
12353	Pink	John	Dr. John Smith	Cancelled		24/03/2020
12354	Brown	John	Dr. John Smith	Cancelled		20/03/2020
12355	Grey	John	Dr. John Smith	Cancelled		20/03/2020

Below the table, there are filters for Patient Ref, Surname, Forename, Dentist Name (dropdown), Status (dropdown), Payer Deceased (dropdown), and End Date. At the bottom, it says 'Showing 1 to 11 of 11 entries' and has navigation buttons: First, Previous, 1, Next, Last.

Now you have your list you can start to contact your patients.

**Contacting your patients:**

The easiest way is to send a simple letter, firstly to let these patients know that you have now reopened and that you will be contacting them in due course to rearrange their routine care appointments. This letter should also include a new membership agreement, Worldwide Dental Emergency Assistance Scheme Summary and a Practice Plan pre-paid envelope, along with full guidance as to re-joining. To make it easy we have put together a simple template letter for you to personalise along with full guidance to re-join. All you need to check is you have enough agreements and pre-paid envelopes.

**Tip:**

Fill out as much of the agreement as possible before posting as this will help the patient. We all know that we are more likely to do something if we can do it quickly.

As a minimum, fill out the following sections:

- If your practice name and address isn't printed in the box in the top right of the agreement, please write this in
- Commencement date
- The Dentist
- Treating dentist name
- Plan fee
- Plan type
- Please cross out the joining fee
- Circle monthly to indicate it is a monthly Direct Debit
- Sign & date the "On behalf of the Dentist"

We suggest that you also monitor if your patients do re-join or not and if they have not re-joined within a few weeks, then do not be afraid to follow up with a call to check that they did receive the letter.

Before you do, make sure you have the following information to hand:

- Which option they were on
- When they last attended
- When they are due their next routine care appointment.
- When they cancelled their plan membership
- Membership benefits

Here is a helpful script that you can adapt to suit your own style:

*"Hello Mr Smith, this is Kathy calling from The Dental Surgery, I do hope you are well. We sent you a letter a few weeks ago to let you know that the practices had reopened. Did you receive the letter Mr Smith?"*

*Good, I realise Mr Smith, that you did cancel your plan membership, which is understandable, as you were unable to access dental services at the practice. Now that we are open and hoping to start to see patients for routine care very soon, we wanted to make sure that you had the opportunity to re-*

*join your membership and as a loyal patient at the practice, there will be no joining fee or back payments.”*

*If you would like to join you just need to fill out the agreement that came with the letter and pop it in the prepaid envelope. Once we have received notification, we will contact you to arrange your next appointment as we have reserved plan membership appointment slots for our member patients”*

If the patient does not respond straight away, you may wish to remind the patient of the benefits of the plan they were a member of.

If the patient is not too sure if they would like to re-join the plan then ask them if they have any queries and also let them know that they are still very welcome to come to the practice on a pay as you go basis; however, do remind them that they would no longer benefit from the membership discount.

Alternatively, you could also recommend plan options that may be a lower monthly fee if applicable.

### **Sending letters not your style?**

Why not just pick up the phone to your patients, I am sure they would welcome an update on what is happening, and they will appreciate the call.

As with following up from a letter, do make sure that you have the information listed above to hand as the patient may ask questions about their plan membership.

### **Here is an example of what you can say:**

*“Hello Mr Smith, this is Kathy calling from The Dental Surgery, I do hope you are well.*

*We are contacting you to give you an update on the practice. We are now open and wanted to let you know that once we have dealt with patients who are in need of urgent care, we will then be contacting patients to re-establish their routine care appointment and we would like to thank you for continuing to be a loyal patient.*

*I did also notice Mr Smith, that you did cancel your plan membership, which is understandable, as you were unable to access dental services at the practice. Now that we are open and hoping to start to see patients for routine care very soon, we wanted to make sure that you had the opportunity to re-join your membership and as a loyal patient at the practice there will be no joining fee or back payments.”*

*If you would like to join, there is no need to come to the practice. I can pop an agreement form in the post for you to complete and send directly to our plan administrator in the prepaid envelope that will also be enclosed with the agreement. Once we have received notification, we will contact you to arrange your next appointment as we have reserved plan membership appointment slots for our member patients”*

If the patient does not respond straight away, you may wish to remind the patient of the benefits of the plan.

Alternatively, you could also recommend plan options that may be a lower monthly fee if applicable.

If the patient is not too sure if they would like to re-join the plan then ask them if they do have any queries and also let them know that they are still very welcome to come to the practice on a pay-as-you-go basis. However, do remind them that they would no longer benefit from the membership discount.

If the patient is happy to re-join and to avoid the patient having to come to the practice unnecessarily, you can post out an agreement to them with guidance on how to join, along with a Practice Plan prepaid envelope. And yes, we have a sample template letter ready for you to personalise.