



Taking a Team Approach



for the New Patient Experience

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Be an advocate for patients in the changing marketplace!

- **Initial Phone Contact**
- **The “Welcome” System**
- **Gracious Greeting**
- **Escorting the Patient**
- **Taking a Team Approach**
- **The Examination**
- **Treatment Presentation**
- **Patient Handoff**

1) Initial Contact: Make an Impactful First Impression

- Phone communication checklist
- Telephone communication slip or digital template
- Sharing new patient info at the huddle



Initial Contact: Phone Etiquette

- Your attitude
- Your facial expression... smile!
- The greeting
- Take interest in the caller, they're a person!
- Use "hold" respectfully
- Wrap up the call with enthusiasm



Initial Contact: New Patient Intake

- Complete on all new patients and emergency patients
- What's most important for you to know? Have specific questions which lead you through a rapport and value building interaction with the patient
- Set reasonable expectations and answer all patient questions
- Excellent training tool for new staff



2) The Welcome System

- Welcome letter, email or text link
- Patient registration/Health history/HIPAA/Privacy Act forms
- Don't overwhelm them with information...if they want more, they can visit your website
- With all electronic information, make sure the links work!



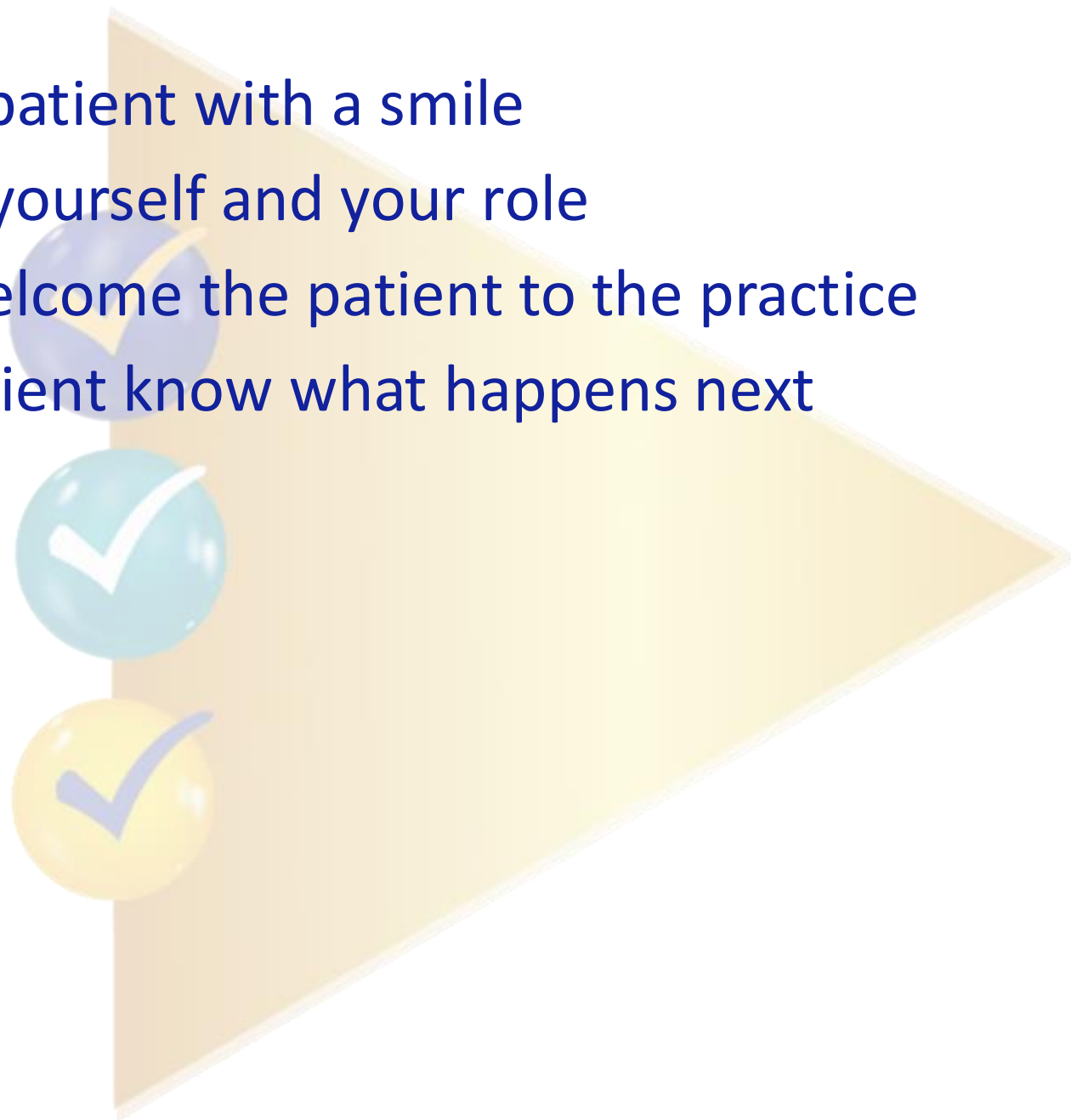
Share New Patient Information at the Morning Huddle

- Be prepared! Thoroughly review information from Telephone or Digital Intake
- Team to take notes on personal copies of the schedule
- Show interest and enthusiasm for new patients joining your practice



3) The Gracious Greeting

- Greet the patient with a smile
- Introduce yourself and your role
- Warmly welcome the patient to the practice
- Let the patient know what happens next



4) Escorting the Patient

- The Dental Assistant enters the reception room...yes, enter the reception area!
- Smile and introduce yourself and your role
- Warmly welcome the patient to the practice
- Offer to tour the office



4) Escorting the Patient

- Escort the patient to the operatory or consultation room
- Get to know the patient
- Set the expectation for the visit
- Don't ask why the patient is here...acknowledge what was shared in the huddle
- When doctor enters, introduce the patient to the doctor



The Vital Role of the Dental Assistant

- **You are important to the patient & the process! The assistant remains in the operatory and documents while the Doctor gets to know the patient.**
- **Follow your practice protocol for documentation of specific issues that come up during the Doctor/Patient conversation.**

The Vital Role of the Dental Assistant

- **The DA listens, observes and documents – your engagement is so important! In addition to clinical considerations, listen for:**
- **Motivators: What's important to the patient**
- **Concerns: What may keep a patient from moving forward with necessary treatment**
 - **Examples: health, money, time, fear, esthetics, function**

5) Taking a Team Approach to the New Patient Experience

- Doctor interviews while the DA listens and documents
- The intention is to build trust
- Ask questions and listen - 80/20 rule
- Focus on the patient
- Body language must exhibit interest, openness and caring
- There's so much more to the patient than their clinical needs. Get to know them.



Examples of Questions that Lead to Trust and Rapport Building

- How important is it for you to keep your teeth healthy for a lifetime?
- If you could change one thing about your smile, what would it be?
- What things are important to you about your dentist and/or dental practice?
- What else is important for me to know about you?



6) The Clinical Portion of the Exam

- Efficiency is improved with a systematic approach which frees you up to engage with the patient
- To ensure thoroughness, the DA leads the Doctor through the charting process
- Make sure your templates are fully developed and functional
- Use the patient's name! If not, the patient may feel invisible
- Doctor hands-off to DA for necessary diagnostics



6) The Clinical Portion of the Exam

- Per your protocol, the DA takes x-rays, intra-oral photos and scans.
- Educate and engage the patient along the way
- Be sure to use your technology and visual aids-so helpful in bringing clarity to the patient.
- Be sensitive to patient comfort concerns. Read their body language.



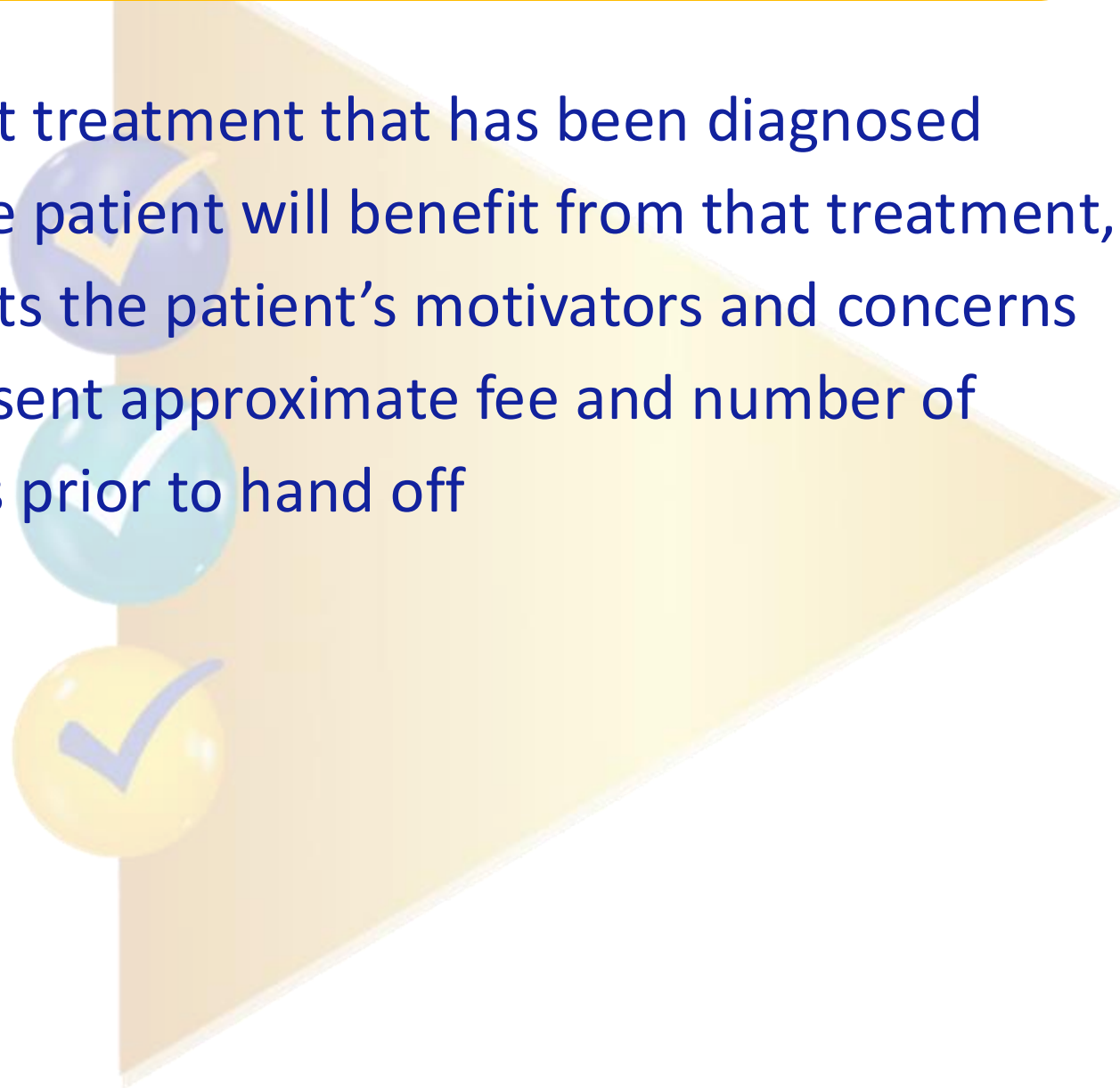
6) The Clinical Portion of the Exam

- Be sure the Doctor has all the necessary tools to complete an exam
- X-rays on the monitor
- Photos: Intra Oral & Extra Oral
- Dr. verbalizes existing conditions & necessary treatment
- Document in the computer NOW



7) Treatment Presentation

- Be clear about treatment that has been diagnosed
- Know how the patient will benefit from that treatment, so that it supports the patient's motivators and concerns
- Doctor to present approximate fee and number of appointments prior to hand off



8) Steps for a Successful Handoff

1. Either verbalize or use the inter-office communication system to inform the administrative team what was learned during the new patient exam, such as:

- Patient motivators and concerns
- Patient-specific information (i.e., financial concerns, anxious about dental treatment, etc.)
- Patient decision about moving ahead: some or all their treatment
- Patient preferences for desired appointment time of day/etc.



8) Steps for a Successful Handoff

2. At the conclusion of the exam, escort the patient to the financial coordinator to discuss the financial aspect of their treatment plan if treatment presented today. Unless the Doctor needs to review the case, the final treatment plan should be in the computer and ready for the admin team.

3. After the payment arrangement is complete, schedule the next appointment

4. If the patient is to return for a consultation, escort the patient to the appointment administrator.

Explain scheduling protocols to the patient: the importance of keeping appointments and, if appropriate, the broken appointment fee protocol.



8) Steps for a Successful Handoff

5. If patient doesn't schedule their next appointment, negotiate a follow-up contact date

6. Enter date into the calendar system





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Thank you
for coming!