



# **ESSENTIAL SYSTEMS**

**The Nucleus of Every Practice**

by

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PRACTICE BUILDERS

for

**The Thompson Okanagan**

**Dental Society**

## **Essential Systems**

The Nucleus of Every Practice

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### **Why Systems are Essential**

- Organization
- Efficiency
- Direction
- Consistency
- Confidence
- Trust
- Quality Care

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### **How YOU Impact Your Dental Practice**

- First contact for patients
- Create the atmosphere for the patients' dental experience
- Set the pace for a smooth, stress free, working environment
- You start the flow
- You are important

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### **The Dental Practice**

- In the profession of dentistry our role is to add value to the lives of our patients through quality dental treatment and total patient care in a professional, service oriented practice.
- Patients want a high trust, low fear environment. They need sincerity and understanding.

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### **Customary Goals of Dental Practices**

- To provide quality dentistry
- To create a friendly, professional, high trust environment
- To provide a stable financial environment for the practice
- To achieve practice growth through case acceptance

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### **The Appointment Scheduler**

Central Work Place  
Controls the Practice  
Most Key Element Physically

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### **The Appointment Scheduler**

- Who controls your schedule, you or your patients?
- How do we know what the ideal schedule is? And how do we achieve it?
- What makes the schedule efficient?
- Do your patients value their appointment time?
- Do you feel that your appointment time is valuable?

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### **How You “Say It” Matters**

- Be assertive, not aggressive
- “Dr. Smith would like to see you back as soon as possible for your restoration, I have next week at 2PM”
- Never ask a patient if they would like to book an appointment
- Always offer your difficult times to book first

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### **Ideal Schedule**

- Ideal is a matter of opinion, and your doctor’s opinion matters
- Ideal should be the least stressful and most productive
- Using “Reserved Time” for ideal scheduling

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### **Efficiency in Scheduling**

- You control the schedule, not the patient
- Book back to back not 1 or 2 units in between
- A well scheduled day is orchestrated, it doesn't just happen
- Stagger dismissal times

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### **Scheduling Guidelines**

- What is your doctor's scheduling preferences
- Give your patient two choices
- Provide detailed information regarding what will take place at that appointment
- Emphasize the importance of recommended treatment
- Give an estimate of the cost

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### **Scheduling Guidelines**

- Inform your patient of the length of the appointment
- If no appointment is booked, ensure a contact is created
- All patients should leave with an appointment card, an estimate for their next appointment, with all their questions answered

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### **Focal Points**

- The importance of the treatment
- The benefit to the patient's long term dental health
- It is more costly to correct extensive emergency problems then to maintain a healthy dentition (preventative)
- We care about our patients oral health

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### **Patients Calling to Book**

- Check patient's chart or electronic file, all notes should be recorded there
- Verify the contact, checking the procedure, time and provider needed
- Always check to see if there are any outstanding balances
- Unless patients have a history of not valuing their appointment time, schedule ASAP

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### **The Physical Schedule**

- What information should be on your physical schedule
- Posting printed paper copies
- Personal information cannot be exposed to our patients
- Reviewing the schedule in morning huddle
- Be proactive, not reactive

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## **New Patients**

First Impressions Count  
Booking  
Protocols and Policies

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## **New Patients Initial Contact**

- Initial Booking
- What is the patient in need of?
  - Offer an appointment and give detailed information on what they can expect upon arrival at our practice
  - Obtain necessary information only
  - Review necessary policies only

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## **The New Patient Experience**

- When the patient comes in
- Greet them with a warm friendly smile and welcome them to the practice
  - Introduce yourself and the team member that is going to seat them
  - Be sure to indicate that our goal is to offer the best possible dental care
  - Ask if they have any questions regarding our office

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### **The New Patient Experience**

Our dental questionnaire

- Ideally filled out by the patient in the consult room, or if space does not allow in the waiting area (form or electronically)
- When completed, review to ensure all aspects have been completed
- Ask the patient do they have any questions or was there any aspect they did not understand

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### **The New Patient Experience**

- Review office policies (appointments, assignment and financial)
- Ensure that the patient is aware of what will be taking place today
- How long it will take
- Approximately what is the investment \$\$
- Do they have any question about today's treatment, or our office policies

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### **Entering New Patient Information**

- Enter patient information as soon as you have collected it in your software
- Do not wait until the patient comes out
- Ensure that all field are entered
- As soon as a treatment plan is made, set/record their recare interval along with the time required for their recare appointment

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### **New Patient Exit**

At the end of the appointment

- Process treatment, claim forms
- Present and explain fees
- Collect fees & provide receipt
- Book all necessary appointments
- Provide estimates as necessary
- Ensure patient leaves with all their questions answered and happy

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### **Patient Files**

Accurate records  
Professional Image

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### **Updates for Arriving Patients**

- Confirm with the patient that all personal information is up to date
- Verify that any planned treatment listed in your software/chart is accurate and current
- Check Appointment Contacts for the family

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### **Updates for After Treatment**

After Treatment but Before Billing

- Recall Interval amended to dentists/hygienists recommendation
- Time allotted for the recall is accurate
- Verify insurance information
- Ensure families are financially connected correctly

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### **De-activating Patient Files**

- Pull the patient's physical chart and make an entry
- Only forward requested records with a written consent from the patient
- Ensure there is no balance owing
- Inactivate the patient in your software and file with inactive charts
- Remove unnecessary information in software/chart (contacts, pre-d's, etc)

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### **Recares**

The Back Bone of Every Practice

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### **Recare System**

Reasons:

- Maintain Oral Health
- Periodontal treatment

Objective

- Offer our patients the best possible care
- Assist in a well booked schedule
- Generate income
- Review the dentist's treatment not completed

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### **Pre-Appointing**

- The life line of the practice
- 95% of all appointments are possible to pre-appoint with good verbal skills
- We care about your oral health
- If an appointment is not booked, always note WHY

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### **Non-Booked Recares**

- Become proficient with your software's recare system (invest in training)
- Make note of every effort made to book an appointment on the contact
- The telephone is the most effective means of booking non-booked recares
- Two calls and a letter

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## Confirmations

Responsibility  
Appointment Value

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## Confirming Patients

- Keeping an appointment is the PATIENT'S responsibility
- Create value for appointment time and the recommended treatment
- Note all confirming efforts on the contact
- When to reschedule
- Lab Cases
- Pre-medicated Patients

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## Confirmation Verbiage

- Hi, this is Sandra from Dr. Smith's office. I'm calling to verify your 3:00 appointment with us on Thursday. We are looking forward to your visit.
- Always attempt to reach a live person before leaving a message on a home machine

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## **Cancellations**

Critical Policies  
Consistency  
Great Verbal Skills

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## **Why Patients Cancel**

- They do NOT value their appointment time
- No consequences
- It's OK
- Too accommodating
- They are late and no show for the same reasons plus:
- We may run late and cancel with no regard for their time

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## **Why Patients Cancel**

- They don't perceive the value of the recommended treatment
- They don't feel the value outweighs the cost
- They owe you money
- Rarely, life happens and something serious prevents them from attending a valuable appointment that they see as necessary.

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### **Stop Cancellations**

- Communicate
- Set cancellation policies
- Stick to your policies
- Consistency is paramount
- Short term pain for long term gain
- Executive list

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### **Tracking Cancellations**

- Make a note on every cancelled appointments contact/chart
- Use your software to track all cancelled or missed appointments
- Use your tracking/documenting to uphold cancellation policies

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### **Billing**

Accuracy  
Value for Treatment

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### **Billing Essentials**

- Insure you have a set method of giving completed treatment to the business assistant
- Present all procedures complete to the patient whether there is a personal balance or not
- Have clear financial policies
- Bill, collect, then book

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### **Your Fees**

- Never defend fees. Always explain value
- Explain treatment as an investment
- Our fees reflect the quality of the care and service we provide
- Do you want the best treatment or the best price?

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### **Financial**

- Have set payment policies in writing
- Ensuring to implement these policies
- Communicate these policies to your patient in a positive way
- All financial arrangements need to be in writing and signed with a commitment to pay
- If you extend credit, you need credit information

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### **Presenting Treatment**

- Do not pre-judge patients
- Give patients all their options
- Give a clear and decisive written treatment plan
- Indicate the time required to complete the treatment ie:
  - Number of appointments
  - Length of each appointment
  - Who they will be seeing
- Present their financial investment

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### **Case Acceptance**

- Patient Loyalty
- Individual attention
- Quality and value for the recommended treatment
- Meeting our patients' expectations

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### **Patient Expectations**

- Patients need to be spoken to in layman's terms
- They want to feel understood and informed
- By nature people verbalize negative experiences
- It isn't always what you say, but how you say it
- People want to feel important, respected and understood

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### **Overcoming Objections**

- The more value we create for patients the easier it is to overcome barriers such as cost and fear
- Being well versed in all aspect of the patient's treatment and why it is recommended
- Reiterating the advantages of the treatment

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### **Overcoming Objections**

- It is our obligation to tell patients the consequences of not proceeding with recommended treatment

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### **The Team**

- A well staffed practice with extensively trained team members is required
- Understand and appreciate what other people's qualities are, we are all equal but have different responsibilities
- All dental practices require a team oriented staff to be successful
- All team members should be constructively contributing to positive change and progress

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### **The Team**

- The best asset we have is committed staff who believe in the Doctor, the quality of treatment and care, and are excited to share it with patients
- Our goal as a team is to create a friendly, professional, high trust environment

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### **Listening and Communicating**

- We cannot meet patients expectations if we don't listen to what they want
- We create value by showing and describing the benefits of the recommended treatment
- Patients only accept treatment for what they consider valuable and important
- They cannot value something they do not understand

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### **Listening and Communicating**

- Ensure that patients understand all you are trying to say
- Be well rehearsed
- It is imperative that we are as caring, pleasant, interested, concerned and empathetic at 8:00AM as we are at 5:00PM
- Learn to talk dentistry, discussing the benefits of new services and technology

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### **Communication**

- First contact creates a lasting image
- You represent your entire team
- Be aware of all your office policies
- Clear and concise
- Professionalism (Non emotional – non personal)
- Listen to the patients needs

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### **Why Patients Seem Difficult**

- Patients are not usually at their normal comfort level when in a dental office
- Misunderstandings and lack of communication are 99% of the problems
  - Get to the root of the miscommunication
  - Be objective
  - Emphasize that you are there to help resolve
  - Ensure the patient understands that you care about them

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### **Differentiating Your Practice**

- Offer your patients more than they expect
- Make all conversation and documentation professional
- Be sincerely interested and caring
- Create awareness about your practice and all it has to offer

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