Front Desk Training Items

Checklists:

By completing checklist items thoroughly and accurately; we create a standard of care that is exceptional for all patients.

- Items should NOT be checked off and put on clip board first thing in the morning.
  - Only patient's name and amount due should be entered on the paper at the beginning of the day. (By doing that you can check the box "write amount below")
- If you are not sure of the amount – do NOT leave it blank! Go talk to the assistants and find out what is going to be done, and come up with the plan. They are counting on front desk to get it right.
  - If credit or balance on the account to begin – please write that off to the side to avoid confusion.
- 15 minutes BEFORE the patient walks through the door, pull out the checklist for that patient and review the account, set the appointment complete, be ready to call the patient by name when they walk in the door, be friendly and social with them…make a connection!
  - Review before they walk in: Do you need a text # or email? Should I ask if insurance or address/phone info changed? Do I need to update a picture, etc.
- Once patient has walked in the door, questions are asked and updated you should then check off the remaining boxes and mark "patient ready" button.
- *Remember* that you are the contact between the patient and the back office. If something on the account or procedure looks incorrect……COMMUNICATE with the back office to resolve!
- Try and keep papers orderly and organized throughout the day.

- At the end of the appointment – look quickly over the check list items BEFORE patient leaves. Know them by heart, so if the paper doesn't come up – you know what to look for.
- After patient leaves go over checklist items thoroughly, one by one – and use the RED FLAG checklist. This is where we catch problems with a payment or insurance set up. It's important to get it right!

Appointments:

By reviewing appointments two days before; we catch little problems that could make a big difference to the patient and to our office. It's important to follow the steps:

- BEFORE you start calling first look at each appointment. Tetris the schedule where possible, and be willing to find small places that you can free up time. Even ask some patients to come in 10-20 minutes early to help accommodate.
- Mark the schedule with items of importance:
  - NEA # - should be added to all appointment notes when a big procedure such as a crown, RCT, implant, braces are being performed.
  - CONSENT FORMS – should be added to all appointments that are: extractions, RCT, implants, or braces.
- Look for problem areas:
  - Are all labs received? If not start calling on them to make sure they arrive in time.
  - Are we doing Nitrous or SRP at the same time? We only have the capability to do those one at a time in Springville (2 at Payson) – we will need to move appointments around if we are double scheduled …go talk to back office and make a decision to resolve. Then call the patient to reschedule if needed.
  - Look for other procedures that just don't look right – go talk to person doing the procedure (Doctor/hygienist) and make a decision on how to resolve.
- Last step would be to call the patients to confirm and mark their appointment status.

Closing the TX plan:

It is not enough to just try and schedule the patient as they are walking out the door. By closing the treatment plan affectively we do our part to bring revenue into the office and help the patient get the service they need. Please follow the guidelines CAREFULLY when closing treatment plans.

- Go listen to the exam for a new patient – EVERY TIME! Leave the front desk and listen to the doctor exam for the patient. By doing this you will understand the tx, the priorities, and what the situation is.
- After exam, you usually have just a few minutes to quickly look over the tx plan with the RED FLAG checklist. Do all items look correct? Is the insurance paying for anything? Is there a write off on EVERY procedure? Are office visit copays added (if needed?)
- Go to the consult room – this is important – don't miss this step!
- When presenting the tx to the patient, it is important to FIRST build trust! Making statements like, "You have great insurance it looks like they pay 50% for your major

work and you have a $1500 annual max" or "Your insurance is just a discount plan. They won't help you pay for these procedures, but we do offer you a great discount because we are preferred providers of your plan." ASK if they have any questions about their insurance! This gives them the opportunity to understand it and you the opportunity to build the trust that you understand it very well.

- Thoroughly explain the treatment plan! Point out what the colors mean in the chart. Go over standard fees, what the insurance will pay, the write off and the patient portion. Be SURE to circle the patient portion and help educate the patient that the amount listed will be the amount needed to bring in to their next appointment. Talk about how the doctor has broken their tx into priorities….and before moving on: ASK if they have any questions.
- Don't assume that patient might want to schedule. KNOW that they will schedule. Assume the appointment by saying things like, "What day works best for you to come in and get started."
- IF a patient doesn't schedule, it is YOUR responsibility to find out why! Asking questions like, "Does this sound like something that might work for you?" Or "Would you like some financing options?" Usually at that point (if you haven't already) you will hear the "road block" that is standing in the way for the patient to schedule. Treat with respect and understanding.
    - This is a great time to look at the insurance set up. IF the insurance pays something for the procedures then offer an in house payment plan and talk about details. IF the insurance doesn't pay then review with patient care credit options….even offer to help them apply right there in the consult room.

Payment Plans:

When we fail to offer payment plan options, we fail to help our patients take advantage of our amenities! Don't stop short of providing a way for the patient to receive treatment and help build our growth!

- Offer payments plans **whenever** the insurance pays for part of the procedure.
- Know the flexible terms and be willing to think outside the box…remember YOU are the patient advocate!
- Know your limitations and not negotiable items (i.e. card on file)
- When in doubt= talk to the office manager or doctor
- When setting up payment plans:
    - Review items thoroughly
    - Ask patient what date works best for them; help them feel that they are in control. (Even though YOU are) ☺

- Make sure the payment amount is going to work for them = ASK!
- Use the portal when setting up payment plans, get signatures, and scan documents into the patients account
- Don't forget to save a treatment plan with "PREPAID" next to items that are included in the payment plan.
- Leave notes in the comm log! The more notes about the payment plan, details, and options the better.

<u>What makes the perfect patient advocate?</u>

- Calling the patient by name
- Paying attention to their needs (i.e. Are they warm or cold, struggling with a baby, need help opening the door, been waiting in the waiting room to long?)
- When tx plan is presented is there something you might need to discuss with the doctor? Items could include: bundling deal, abutment write off with surg. stent when hesitation to schedule, an upset patient that needs help.
- Making sure patient gets seated on time. If office is running late – don't be afraid to say things like, "John, we haven't forgotten about you! It looks like they are just finishing up…and it should take 5 more minutes" OR go back and talk to the assistants and see if we can get x-rays started.
- If you don't know the answer to the question….ask! Don't give false information.
- Remember that the patient that you are with at that moment is your first priority! Don't get caught up in the next patient or check list, just to get through the day. Stay 100% focused on the patient in the office at that moment
- Be honest and sincere!

<u>Housekeeping Items:</u>

- Remember you are the first impression of the office…SMILE! ☺ Greet patients by name when they walk in the door whenever possible and make a connection with EVERY patient!
- Look around the waiting room a couple of times a day to straighten up and pay attention to the temperature. Be sure the room is inviting and clean.
- Keep front office area neat and tidy when at all possible. Keep drinks and food out of sight of the patient. Cell phones should remain in lockers.