New Frontier of Front Desk Positions

pmm news
and marketing news
practice management

The front desk position's new frontier is to have one person designated as a technology coordinator who is very comfortable and knowledgeable with using the computer and Internet. Traditional front desk staff positions are check-in/greeter, check-out/scheduler, billing/insurance, and office manager (depending on the size of the practice). As technology is introduced in the practice to make front desk systems more efficient, fully utilizing the technology does not always take place. If front desk staff possess minimal technology experience, they end up limping along with trying to use the new software programs due to only basic or minimal training. The unfortunate outcome is powerful programs are greatly underutilized or wrongly utilized which results in frustration for everyone, a decreased return on investment and lower practice productivity. When technology is implemented correctly at the front desk, your staff will have more time to concentrate on customer service and actions that increase production.

The technology coordinator would be the lead person to implement and support the strong utilization of technology systems in the office, instead of spreading out the utilization of these systems amongst many staff members who lack the necessary background of skills. The technology coordinator would be the point person for system upgrades, training staff on software systems, utilizing social media and making sure full implementation of all technology systems takes place.

In Office Technology that Every Practice Needs

- Automated patient communication system — the top four used in the industry are Lighthouse 360, Demand force, Solution Reach (formally known as Smile Reminder) and TeleVox.
  - — Appointment confirmation: voice message, e-mail, text
  - — Preventive care appointment reminder: post card, voice message, e-mail, text
  - — Reactivate lost patients
  - — Online reviews: Google, Yelp, Rate a Dentist
  - — Birthday cards sent or emailed
- Dental practice management software used for front desk systems and clinical charting. The top four used in the industry are Dentrix, Practice Works, Eaglesoft and Softdent.
  - — Scheduling: blocking scheduling, scheduling to goal
  - — Short call list to get patients in sooner
  - — Electronic statements
  - — Practice management reports: status of production, collection, accounts receivables, new patient referrals, recare, unfinished treatment plans
  - — Utilizing a tickler file for reminders
  - — Account and medical alerts
  - — Utilizing scanned documents for quick review of important information
- Internet
  - — Practice website
    - Integrated with access to new patient forms, Google maps and links to reviews
  - — Insurance management and processing
    - Electronic eligibility and real time claim status
- Electronic banking
  - — Electronic funds transfer from insurance companies
  - — Electronic deposits in office with a check scanner provided by your bank
- Social media
  - — Practice Facebook page
  - — Claim your Google+ business account
  - — Doctor's LinkedIn profile
  - — Online reviews alone will boost the practice visibility and increase search engine optimization results. Patients are more dependent on technology and looking for reviews of businesses now more than ever
- Digital radiography
  - — Makes the transfer of radiographs to other doctors easier
  - — Helps the office be chartless
- Scanner
  - — Helps the office be chartless
- Data back-up systems
  - — Regular backups are essential the more technologically advanced an office becomes. Cloud and mirror backup systems will ensure that data is not lost
- Limiting access levels
  - — Limits to staff access levels in the systems are needed to avoid changes in settings and confidential practice information

Step #1: How to Get Started

- Have a team meeting to discuss the advantages of having a technologically advanced office.
  - — A slow integration process is beneficial to avoiding stress since staff may be somewhat resistant to change. Express an understanding that integration of these systems may take some time and is not expected overnight. Address staff concerns and stress that these systems will make the office more

productive in the long run and eliminate production killing broken appointments.

- Decide on which new systems will be the most helpful.
- Develop an action plan for integration of the new systems. Focus on the positives of the software systems such as having the automated system assist with recall reminders, unfinished treatment plans, appointment confirmations, sending important messages and or newsletters, and online reviews.
- Decide who will become the practice technology coordinator. If there is not currently a front desk staff member that has the skills to take over this position, consider hiring someone either full time or part time for this position depending on the size of your practice. The full utilization of technology systems will increase marketing, new patients and production, as well as maximize the recare and unfinished treatment plan systems. Thus, the increased productivity should more than pay for an additional staff member.
- Create a job description for the technology coordinator.
- Decide what additional training will be needed, who should be present and schedule the training.
- Notify your patients that they will be seeing some changes in your practice to make communication with the staff easier. Express the benefits of e-mails and text messages and their choice to opt out at any time if they prefer.

Step #2: Implementing the Changes

- Set small goals with staff from this point forward such as:
  — All patients need to have an e-mail address on file as well as proper distinction between cell phone and home phone.
  — Track every new patient's referral source and update current patient's referral source.
  — When contacting insurance companies verify that the records reflect the proper payor ID number and ask if an EFT program exits.
  — Change all family member's info at the same time.
  — Enter alerts on each patient for medical situations, allergies (latex), extra time needed or special concerns that you want to pop up when you click on the patient. This can be used for account alerts as well.
- Gather the above patient information in the following manner so it is not overwhelming.
  — You will only be gathering this patient information for two days at a time. On patients scheduled today and patients scheduled two weeks from today. This will allow you to integrate the system in two weeks with minimal issues and not have to contact the entire data base at once. For example, if the go-live date for an automated patient communication system is April 15, then on April 1 update patient information for all patients scheduled on April 1 and April 15. On April 2, update patient information for April 2 and April 16. After the go-live date, most systems will generate a daily report of missing patient information that the staff can follow up on.
- Hold a meeting with your automated patient communications trainer to review the system. Check all the scripts and settings. Set in place the texting and confirmation timelines that best fit your practice. Review the automated systems and make changes as needed. Ensure that all correspondence from your office includes your office logo.
- Contact your dental software support to sign up for electronic services. They can remotely check your settings to coordinate software and defaults for the electronic services.
- Coordinate with your webmaster to integrate links to the doctor review sites, Google Maps and place your new patient forms online so patient information can go directly into the dental software. By sending patients to your website for new patient paperwork they can get familiar with your office before coming in for their first visit as well as have a resource to refer their friends to who might be looking for a new children's dentist.
- Double check your continuing care settings in your dental software for what code activates recall and what does not. Inaccurate information could mean a child receives a notice who might have just had a prophy or possibly miss someone who needs to come in for an appointment.
- Clean up your past due treatment plan list. You do not want people receiving notices that they have treatment to complete when they already have completed their treatment plan. This can become an issue if not managed correctly at check out when treatment changes and the old treatment is not taken off of the treatment plan or when services are not added to the appointments.
- Install the appropriate software to process the electronic deposits through your bank. Contact the bank if needed to ensure that the system is working properly.
- Make a list of all companies that offer EFT and enroll in their systems. Make sure you know the log-ons for each company to be able to access their electronic EOB's.
- Run a report in your dental software system to determine who has an e-mail address on file. If not in the system, review patients paperwork to gather the information if possible. If none available determine the best way to gather that information from the patient.
- Do not duplicate notifications. Determine when you will stop sending out postcards so the patient does not receive a recall notice from you and from your automated patient communication software system at the same time.
- Sometimes additional information is needed.
- Review the reports daily to head off any issues before they become a headache.
- Review the electronic claims processing report as well as

reports generated by your automated system regarding patient communications. Most reports will notify you of what crucial information is missing from the patients coming in that day.
- Verify online daily with your bank what funds are being received. It is simple to check bank deposits verses each insurance companies' website daily to determine when funds come in. You can also verify that the deposit from the day before was received.
- Create a business Facebook page and start encouraging your parents/patients to "Like" you. Coordinate with your automated software system to post all patient comments received on your Facebook page. This will boost your search engine optimization results.
- Encourage parents to "check in" on Facebook when they come to the office for their child's appointment. This will create a posting on the parent's friends Facebook newsfeed that the parent brings their child to your practice.

Step #3: Evaluate the Outcome

- Hold a team meeting to discuss what is working and where adjustments need to be made.
- Discuss feedback received from patients and reviews received.
- Discuss additional technology systems that the office would like to use next.
  — Newsletters, paperless practice, software integration for practice website that allows patient log-ons to view appointments, make payments or patient education videos, etcetera.

Technology systems pay for themselves and benefit the practice and the patients once they are properly utilized. Patient treatment does not fall through the cracks and patients love the convenience of receiving text messages and/or managing their practice account online. Most automated patient communication systems are month to month and cost under $300. Front office staff spends on average two hours/day confirming appointments, working recall lists and sending out birthday cards. Once these tasks are automated, the front desk staff can use the additional two hours/day to be more available to provide excellent customer service and work on keeping the schedule full.

"Any sufficiently advanced technology is indistinguishable from magic."

Arthur C. Clarke

american academy of pediatric dentistry
211 east chicago avenue, suite 1700,
chicago, illinois 60611-2637

pmm news
practice management and marketing news

Published four times per year as a direct membership benefit by the American Academy of Pediatric Dentistry (AAPD), 211 East Chicago Avenue, Suite 1700, Chicago, IL 60611-2637, (312) 337-2169. ISSN 1064-1203. *aapdinfo@aapd.org*, *www.aapd.org*. Writer: Julie Weir has built an outstanding reputation as a consultant, international speaker and author in the business of dentistry. Opinions and recommendations are those of the author and should not be considered AAPD policy. Chief executive officer: Dr. John S. Rutkauskas; Publications Manager: Cindy Hansen; and Publications Coordinator: Adriana Loaiza.