



VERBAL SKILLS



SCHEDULE PLANNER



PATIENT CHART



RECALL POSTCARDS

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### Actions to Take in Tough Economic Times: Sharpen your Sword

This is the third in a series of three articles about actions that you can take to assure your practice is running as efficiently as possible. These steps will help maximize profitability during recessionary times. The first article discussed how the **practice business plan** will give the doctor a break-even point (collection goal), number of producer (doctor/recall/hospital) work days and, most importantly, calculate each producer's daily production goal number. The second article described how to monitor **practice vital sign numbers** and create a **practice overhead expense budget**. The power in these tools lies in their ability to keep the doctor and team focused on reaching the established goals, making changes based on information from the practice vital signs, and controlling overhead expenses by following the practice budget. Otherwise you risk losing focus, profit and goals.

When times are economically slow, some days can feel like you are fighting a battle to just to keep the schedule full and survive! During recessions you have to work three times as hard to educate and motivate parents and caregivers to accept treatment, keep their appointments and collect the dollars. Any good warrior knows that his sword must be as sharp as possible if he is to win the battle.

You can sharpen your sword by making sure your front desk staff and systems are functioning at the highest level. Practice numbers can only be as good as how the front desk systems are carried out everyday. This includes scheduling, collection, recall, tracking unfinished treatment plans and quality of verbal and interpersonal skills.

Many doctors do not fully understand all of the front desk systems, so teaching a new staff member what should be done in each system can be a daunting task. As an effective leader, you do not want

to ignore this part of your business. In an effort to help educate doctors, I have listed below the most important front desk systems and their benchmarks for performance.

### Verbal Skills

Does your staff have excellent verbal skills? Role-play the following scenarios and evaluate what is being said:

- New patient wanting to schedule an appointment.
- New patient shopper.
- Greeting the new patient when they arrive for their appointment.
- Confirming an appointment.
- Parent calling to cancel an appointment.
- Checking a patient out; presenting the treatment plan, fees and patient payment amount due.
- Informing a parent of unfinished treatment or recall due and asking the parent to schedule.
- The benefit of every procedure that is done in the practice; explain confidently what the procedure is, why it is being done and possible consequences to the child for not having the procedure completed in a timely manner or not done at all.
- Letting the parent know that your practice always welcomes new patients. This is done as a polite way to ask for referrals.
- Answering the following questions:
  - ◆ Does the doctor take my insurance plan?
  - ◆ Why are the doctor's fees so high?
  - ◆ Did you raise your fees?
  - ◆ How much does a filling cost?
  - ◆ Do you take payment plans?



## Scheduling

- Scheduling appointments to meet daily producer (doctor/recall/hospital) production goals. Production scheduled should be 5 percent greater than the goal to be achieved.
- Daily producer production goals are used in the scheduling software and monitored.
- Block scheduling in the scheduling software is created and used while alternating between hard and easy operations.
- A quick call list is kept and used to fill openings.
- Appointments are confirmed two days ahead of time.
- Daily production is written on the top of the day's schedule.
- Recall appointments are pre-appointed before the patient leaves.
- The front desk staff has and enforces policies for no show/cancelled appointments and late patients.
- The front desk staff informs the team at each morning meeting how producer goals were met the previous day, are being met the current day and the next three days ahead.
- The patient show rate is monitored and is 95 percent plus.

## Recall

- Seventy five percent of your patients are active in recall.
- Overdue recall reports are run monthly and worked to completion.
- Postcards are sent one month ahead of time to remind parent of appointment.
- Dismissal from the practice letter is sent if several unsuccessful attempts have been made to contact the parent to schedule a recall appointment.

## Unfinished Treatment Plan Reports

- Run monthly and worked to completion.

## Collections

- Collection ratio is 98 percent plus. This can vary depending upon the type and volume of reduced fee plans in the practice.
- Parents are given a printed treatment plan and always informed of their payment amount before the child's treatment is performed. Parent initials their estimated portion on treatment plan. Copy is kept in chart until paid.
- Co-pays and deductibles collected at the time of service.

- Insurance is filed the same day of service.
- Electronic claim report is worked daily.
- Insurance payments are posted upon receipt and EOBs kept easily accessible for six months.
- Insurance denials/requests are worked upon receipt and notes placed in the patient's account (this documents action taken).
- Insurance claims that are four weeks and older are monitored weekly and processed for payment.
- Billing is done bimonthly dividing the alphabet A-L and M-Z.
- Statements are generated daily and sent for balances due after insurance payment is recorded.
- Any adjustment to production and collection has a note attached stating an explanation. Doctor reviews all adjustments on the end of day report for accuracy.
- The same person that enters the checks does not prepare the deposit.
- The same person that prepares the deposit does not take it to the bank.

## Accounts Receivable (AR)

- Total does not exceed one month's production.
- Total of 61 plus days and older is not more than 18-24 percent.
- At least 35 percent of practice collections are at time of service.
- An AR report is run monthly and all accounts over 30 days are followed up on for collection, especially the accounts 60 days and older.
- All financial calls to a parent are documented in the patient's account.
- Accounts over 90 days are being sent to a pre-collect service.

## Internal Marketing

- New patient referral source is always entered in patient chart.
- New patient referral report is run monthly and referral sources are sent thank you notes and/or goodies.

## Miscellaneous

- Fees are updated annually.

## Standard Operating Procedure

A standard operating procedure (**SOP**) should be written-up for each function and verbal skill that is performed at the front desk, kept in a three ring binder and updated periodically. SOP's are useful for training a new staff member or in the case that another staff



member has to cover at the front desk and perform a task they are unfamiliar with or do not do regularly. A wealth of knowledge, that is extremely valuable to the practice, exists in the heads of your current front desk staff and it is important to capture it before it may leave the office due to a change in staff.

## Action Plan

Here is an action plan of implementation for you to become more familiar with the front desk systems and make sure you are performing as you should:

- Have a front desk staff department meeting and discuss the importance of creating an SOP manual for front desk systems and verbal skills.
- Create a list of all front desk duties and verbal skills that need an SOP.
- Assign each SOP to be written to the appropriate staff member, along with a completion date. It would be reasonable for a staff member to write two SOP's per week until all are completed.
- Sit down with the staff member who wrote the SOP and have them take you through the steps. Evaluate if they are achieving the desired benchmarks of the system, meeting the goal numbers and performing the task at appropriate intervals.

- Evaluate the verbal skills SOP's. These should be in script form.
- Make needed recommendations on system changes for practice improvement.
- Follow-up to make sure that these changes have been and stay implemented.

## Win the Battle

One benefit of challenging economic times is that it forces us to reevaluate things, be more creative and make necessary changes that result in making us stronger in the long run. If after going through this exercise you feel the front desk systems in your practice are underperforming, then there are many resources that are available to help. You can send your staff to different practice management courses or bring in an expert to evaluate your systems and train your front desk staff one-on-one on how to improve their verbal skills and front desk systems. **Underperforming systems can cost a practice 10 percent or more in lost production and collection.** During recessions, your sword must be its sharpest because your profit margins could be the smallest if you are not proactive and careful. So, sharpen your sword to win the battle and make sure you are not foolishly leaving dental dollars behind.

## Sharpen Your Sword in 2009!

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## PMM News



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