

# The Team and Case Acceptance:

Case Acceptance is every member of the TEAMS responsibility. This does not fall solely on the shoulders of the Front Office Manager or the doctor. All team members need to be involved. We succeed as a team and we fail as a team.

## **Clinic Responsibilities for Case Acceptance:**

1. Listen to your patients and what they want – Find out their goals for their teeth, smile and mouth. Always ask this and really listen to their answer. Make sure you also record the answer in their chart.

2. Patient Education – When explaining treatment that is needed, educate your patient as to how important this service is for their health, what might happen if they do not have this done, make sure they are clear on all aspects of the treatment needed.

3. Place Value on Your Services – Use proper verbiage, but don't talk over the patient's head. Always sit eye to eye knee to knee with your patients. DO NOT talk behind them, or make them look around for you. Give them your undivided attention.

4. Ask Questions – Make sure your patients are on the same page. Ask them if they have questions. Ask if what you have told them makes sense. If they have further questions, and if you do not have time to answer, re-appoint them for a consultation.

5. Sell yourself and your services – You are all providing a health care service that is the BEST. Let your patients see this. Be confident.

6. Start a Before and After Presentation Book – Start taking pictures of your cases when they start and then final pictures once you've finished. Do this for all services you provide. Even smaller cases.

7. USE your intraoral cameras – Use them, use them, use them. This is a wonderful tool. Patients can see problems magnified, the way they never would in a mirror. When you show a patient the breakdown of their amalgam filling on a large screen and tell them it needs replacement, this will have a much bigger impact than just telling them. They can see for themselves, the color, the cracks, the leakage.

8. Scheduling – Patients have just heard what they need, you've got them thinking and are there to answer their questions. Schedule their appointment and then take them upfront to discuss financial issues with the Front Office Manager.

## **Front Office Responsibilities for Case Acceptance:**

1. Be able to reiterate everything the clinic has explained – If patients still have questions about their treatment, you MUST be able to explain the same as the clinic just did. Almost word for word. This way the patient will know everyone is on the same page.

2. Know the patient's goals – Look in the computer to see what their answer was for the goals of their smile, teeth and mouth. Be ready to say this back to them, if you encounter resistance.

3. Financing – The most important thing on your patient’s mind is, “How am I going to pay for this?” Be prepared. Pre-approve patients for Care Credit. Have brochures ready and use your CC Ware to figure out the patients exact payments. If they see it in black and white, they will be more likely to go forward. Also, let them know, their mouth didn’t get this way over night and we don’t expect to fix it over night. Break everything out in stages and get the patient focused on the next visit 1st. Especially if the treatment is quite costly.

4. Don’t be too overwhelming – If you know a patient will need several different appointments in order to complete treatment, schedule the 1st two and then schedule another appointment each additional time they are in.

5. Make it easy for them – We all know it’s easier to complete quadrant dentistry. However, sometimes this will not work for your patient. Either due to fear, time or money. If they can only do 1 restoration at a time, schedule 1 restoration at a time. The goal is to keep them coming back and get their treatment completed.

6. Ask questions – In the clinic, they have already asked the patient if they had questions, but you need to ask this as well. If questions become more clinical than financial say, “Mrs. Jones, it sounds like you have more questions regarding the treatment Dr. \_\_\_\_\_ has recommended, is that right? Would you like to come in prior to starting your treatment, to sit and talk with Dr. \_\_\_\_\_ so that he can answer all your questions? We want to make sure you are comfortable, regarding your treatment and that all your questions have been answered to your satisfaction.”

7. Scheduling – If appointment has not been scheduled in the clinic, schedule upfront. Make sure your patient does not leave without a next appointment. Whether that be for treatment, a consultation or their next recare.

8. Some patients won’t schedule, no matter what you do – Ask patients if it would be alright to give them a follow-up call in a week. If they say they’ll call you, say, “Mrs. Jones, that is so kind of you, however, it is our responsibility to take care of your dental health, so if it’s okay with you, I will call to follow-up in a week or two.” Never let a patient leave without an appointment and an “I’ll call you” response.

### **Consultations:**

Consultations are so important for treatment for treatment acceptance. Once you have seen a patient for their initial visit, if their treatment is over \$1000, have them come back for a second consultation. Time and Work on the front end are necessary to achieve Success on the back end. I understand this process can be time consuming for both you and your patients. However, it is a necessary step for treatment acceptance.

### **The Team and Communication Within:**

Everyone in the team has a specific role to play. Every team member should help other members of the team. Everything starts with communication. If you need help, ask. If someone asks for help, accept. No business can run effectively without a good team that works well together. Every member of the team is a leader. Lead the team to accomplish your goals. Assist and encourage. Challenges arise every day, the role of the team is to overcome those challenges together and support one another without assigning blame. Positively reinforce your

team members. If you see someone doing something right, tell them. Thank each other daily for the work you have done to complete the day.

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