

Advanced Practice

MANAGEMENT

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PATIENT FLOW AND FINANCIALS CHECKLIST

Patient Entry

1. Greet the Patient.
 - Role Play, body language – Do we:
 - _____ Smile?
 - _____ Standing up?
 - _____ Greet patients by name?
 - _____ Set the positive, calm, friendly tone for the visit?
2. Verify patient information: address, phone numbers, email and insurance.

Patient Exit

1. **Clinical team member “handing-off” EVERY patient** to a front desk staff person with a completed treatment plan.

And today’s charges clearly outlined in chart or on route slip. (If computerized, clinician enters).
2. Front desk staff posts today’s treatment and asks for payment.
3. Future treatment plan is entered and two copies printed (if computerized, clinician enters).
4. Front desk staff review treatment plan with patient and presents payment options.
5. Front desk staff documents financial agreement on both estimates and has patient initial or sign. Give one to patient and scan into computer or document (place copy in chart).
6. Schedule appointment.
 - Role Play the “hand off” from clinical to treatment coordinator.
 - Role-play payment Option Presentation (at least two scenarios)
 - What % of patients in the schedules (except hygiene preventive visits) have an agreed upon financial arrangement? _____
 - What % of those who were to have paid today actually paid? _____
 - Are all emergency patients prepared for same day treatment costs?
 - Eval + palliative?
 - Procedure?
 - Role play both the phone call verbiage and the chairside verbiage.
 - Are patients committed to care prior to being handed off to the administrative team?
 - Role play verbiage with clinical team.