

# Anatomy of a Patient-Centered Practice

## Team Roles





# Team Roles

## Front Desk

You handle a lot of tasks, duties, and situations each day. You know you help the whole team deliver a great patient experience when you are focused on and fluent in the four areas where the front desk is front and center.

## Your Big Four

- 1) Phones: You're great on the phone, following scripts and using language consistent with them when you go off-script
- 2) Appointments: You have mastered the intricacies of scheduling appointments from the perspective of both patients and the practice,
- 3) Financial: You understand the procedures, policies, and people skills surrounding the explanation and collection of payment, and you have
- 4) Presence: Empathic, effective interactions with patients and staff, both on and off the phone.



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# Phones

The phones at the front desk are where some of the most important conversations in the practice happen. Your skill here is absolutely crucial in helping patients have the best possible experience with our practice.

#### **P=Phone Includes Things Like:**

- Answering the phone, with a smile, within 3 rings
- Being aware of current marketing promotions
- Making confirmation calls consistent with scripting
- Triaging patient concerns
- Complimenting the clinician they are scheduled to see

#### **Specific Outcomes for A=Appointments**

- Every time you answer a phone with a smile within 3 rings
- Every time you deliver the phone script naturally on new patient call
- Every time you mention that “you’ll just love” the assigned doctor or hygienist
- Every time you use a patient’s name



## Team Roles Front Desk

# Appointments

How patients are scheduled and how the topic is handled impacts every patient and everyone in the practice. Your understanding of how to schedule patients in their get their ideal appointment while maximizing the schedule for operating efficiencies is crucial to the satisfaction of patients and the success of the office as a business.

### **A=Appointments includes things like:**

- Scheduling, moving, and cancelling appointments
- Accommodating patient preferences
- Maximizing the schedule with no impact to patient
- Filling openings in doctor and hygienist schedules
- Knowledge of treatment benchmark times
- Confirmation calls

### **Specific Outcomes for A=Appointments**

- Filling a same-day opening in a doctor's schedule
- Correct an incorrectly booked appointment
- Booking an appointment anywhere in an associate's schedule
- Book an owner/doc's patient in an associate's schedule



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# Financial

Understanding everything that needs to happen for the practice to get paid, being conscientious about having everything taken care of when it needs to be, and ensuring that patients are comfortable and happy with it, is another area of your role that impacts all patients and everyone on the team.

#### **F=Financial includes things like:**

- Entering current financial/insurance limits for each patient scheduled
- Ensuring acceptable treatment frequency for each patient scheduled
- Discussing treatment costs and payment options
- Knowledge of financing and payment plan options
- Making it easy for patients to pay

#### **Specific Outcomes for F=Financial**

- Every time you ask a patient their preferred method of payment
- Every conversation that naturally explains our belief in affordable care
- Every time you find and fix an insurance restriction prior to patient treatment
- Every time a patient mentions that we are easy to work with



## Team Roles Front Desk

# Presence

Everyone in the practice needs to be present to create an authentic, empathic rapport. If we connect on a human level to establish trust and open communication, we can give exceptional care to patients and support each other as a team. Talking with patients about their health, time, and money demands understanding and finesse on your part to ensure that patients leave these interactions feeling good.

### **P=Presence includes things like:**

- Making patients feel welcome and comfortable with your words, voice, and body language.
- Smiling and comfortable eye contact
- Cordial staff interactions
- Greeting patients warmly
- Connecting with patients to help explain treatment, payment options, etc.
- Warmly initiating patient transfers

### **Specific Outcomes for P=Presence**

- The patient smiles at your greeting
- You correctly sense and address discomfort or uncertainty
- You initiate a greeting using the patient's name
- Sharing a laugh with a patient
- Assuring patients that their clinician will take great care of them