



Date 9.20.10

“Ask Deb” - Team Talk Blog

Question from Team Member “L”: *“We are considering going paperless, what has your experience been?”*

Answer from Deb: In my experience if you are in a Level One or Level Two practice then paperless can work for you. Often due to the volume model they don’t develop as strong relationships with their patients, therefore the documentation doesn’t need to be that elaborate. I think of every professional in terms of levels. Many of my clients are “leveling up” with their accountants, lab techs etc. It doesn’t mean that a Level One or Two practices aren’t doing the right thing, it’s just that often times you simply outgrow their service offering.

When I conduct an Onsite Trainings for clients I often request that day one is an observation day. Initially many teams are anxious and would rather listen to polka music for the day straight than go through the process. However they always seem to be grateful for the feedback and coming from a neutral party makes it easier to digest. In today’s economy everyone should be interested in becoming more competitive. The observation day is a great way to really see how the business operates, minimize the “freak out factor” and gain the trust of the team.

Every team tells me they are doing a great job. I agree that most are, but how do you know? You know your practice; I know several hundred of them. Even my best run practices normally receive a lengthy list of observations and suggestions in their typewritten business ROF plan.

One part of my observation is to randomly select twenty patients’ charts. Based my findings I can determine what level the practice is at. In a lower level practice you do not need to have a lot of documentation because the treatment being delivered is typically single tooth, high volume, insurance and hygiene driven. There is nothing “bad” about accepting insurance. However an insurance driven practice takes less communication and sales skills due to the business model and required volume.

Here is a sampling of what I look for in patient’s records.

1. Are “naughty patient behaviors” being documented such as their history of CAs/Reschedules, CAs/No Reschedule, tardiness and no shows?
2. Are the patients comfort items (do they need a pillow, head phones, bite block etc) documented?
3. Are patient phone calls noted?
4. Are post operative calls documented?
5. Are the patient’s interests and passions being recorded?
6. Is their referral history documented?
7. Is the team using their tickler reminder system to highlight important follow up dates like “buy Deb a luxurious birthday gift” on her birthday (kidding just seeing if anyone reads my stuff)?
8. Is their blood pressure, plaque and bleeding scores documented?

9. Is the hygienist documenting what home care tools work for this patient?
10. Is the team setting goals with their patients and giving them a specific reason to return?
11. Is the patient's dental story being recorded as part of the pre clinical notes?
12. Are the x-rays high quality?
13. Is the intraoral camera photos high quality and is the camera being used enough?
14. Are email correspondences being recorded?
15. Is the team noting when they ask a patient for a referral?
16. Is the team identifying their A, B and C patients and color coding them in a common area?
17. Are the lab slips scanned? If so can you read them?
18. Is the patients written financial agreement easy to locate?
19. Is the team noting the patient's temperament style (think DiSC profiling system)?
20. Are the hygienists OHI notes comprehensive or are they just documenting with abbreviations and acronyms?
21. Is the doctor and hygienists counseling their patients on nutrition, stress, or lifestyle choices?
22. Is the team documenting the educational materials that were given to the patient?
23. Is the administrative team noting when they email items (doctor's bio, patient survey etc) to the patient?
- 24. Is any of the personal relationship information being reviewed during the AM huddle?**

Level Three and Four practices tend to have a hybrid of paperless and paper systems. I love technology but some tasks can be completed more efficiently on a manual system than in a computer system. What typically gets lost in computers is the personal relationship information. Many offices capture the "data" but forgo the most important element of sales which is the relationship building systems. Without these in place you can't evolve into a Level Three or Four practices.

A random sampling of charts is great exercise to gauge your current reality and to discover the future opportunities you have.

I have attached a brief overview of the Four Levels of a Dental Practice. Should you have comments, suggestions on future topics or don't want to receive these communications again, to contact me at deb.hewitt@cox.net.

Regards

Debra Hewitt