



# Whitepaper:

## The Keys to Daily Patient Preparation

By Kathy Anderson

A football team huddles before every play. They get on the same page and hit the line playing their individual roles towards a common goal.

Can you imagine if they did not do this? Or did it off the cuff or if the play did not have enough detail or omitted key data altogether? What a disaster that would be toward the common goal.

It is the same scenario in a dental practice. A huddle is one of the best ways to impress your patients with your thoroughness, organization and personal approach. Some patients only see you twice a year so be prepared and score a touchdown every time.

Your huddle agenda should be broken into 3 time frames: yesterday, today and tomorrow. It should last anywhere from 20 to 30 minutes and preferably be first thing in the morning. Below is an example of what should be discussed in the team huddle.

### YESTERDAY

What went right/wrong yesterday?

- Schedule
- Patient feedback
- What could we have avoided
- Post-op phone call follow up
- Who scheduled from yesterday

### TODAY

- Schedule problems/concerns
- Emergency time
- Payments & financial concerns
- Discuss new patients/consult
- Prepared Patient chart review

## CHART PREP SLIP

- Motivators and concerns reviewed
- Medical history update (including allergies)
- Pre-Med
- Perio probing/update
- Photos needed
- X-Rays needed
- Treatment plan/delayed treatment – next appointment
- Recall interval review – hygiene appt made
- Family recall overdue
- Reevaluation appointment needed - comprehensive examination
- Issues to address –broken appointments, etc
- Referral - thank you/ask
- Dr. check/specialist update

This may look like it would take forever. Experience tells us if you are prepared it takes less than 1 minute per patient. The patient review may sound something like this.

*“Mrs. Bragg just got back from dropping off her daughter, Kaylee, at University of Florida. She is concerned about losing more teeth. She does not need a medical history update. No allergies or premed needed. We will be doing a full mouth probe and possible shortening her interval of care in hygiene. Let’s take 4 occlusal shots and bwx, see where she is with deciding on replacing her missing teeth and she needs her next hygiene appointment. Her husband Jerry is overdue and she just referred Malena Smith. I will need a doctor check.”*

Everyone involved in serving this patient during this appointment should be taking notes about where they are to be when and what they are to be doing.

## FUTURE

### **Tomorrow**

Announce open time/blocks in the doctor and hygiene schedule.

### **This week**

Announce the number of open hours for Doctor, Hygiene, Exams, and Consults

### **Next week**

Announce the number of open hours for Doctor, Hygiene, Exams, and Consults

Be aware of what is available to the patients you are serving today.

The above information will give you problem solving topics for your staff meetings and keep your morning huddles organized and efficient.