Is the Face of Your Dental Practice Smiling?

A guide to having a well run front desk

The Front Desk Dream Team

- Calm and organized
- Friendly with staff and patients
- Answer phone calls promptly
- Schedule appointments correctly
- Verify insurance eligibility consistently
- Collect co-payments at the time of the visit
- Skilled, efficient and thorough at their jobs
- Strong work ethic
- Accountable
- Reliable
The Front Desk Reality

- Overwhelmed and stressed out—phones ringing nonstop, too much to do, too many patients, understaffed, not enough time
- Sometimes they have no choice but to cut corners
- Sometimes we give the job to people with the wrong skill sets
- Sometimes there is a lack of accountability—no clear expectations or performance measurements

Why Does This Matter?

- The front desk is the public face of your practice; if dysfunction exists here, patients assume dysfunction exists throughout
- Patients don’t know what’s going on behind the scenes, so their opinion/understanding of the clinic as a whole is formed by their experience there.
Why Else Does This Matter?

- Much of the work that supports financial sustainability takes place here.
- The front desk staff:
  - Manage the daily schedule and ensure it is full
    - The schedule is your #1 tool to set your clinic up for success with both quality outcomes and financial success.
  - Communicate all company policies to patients
  - Are the first step in the revenue cycle:
    - Verify insurance/income level
    - Request Payments – preferably before treatment begins

Set yourself up for success
Hiring the Right Staff

First and foremost, hire for ATTITUDE: positive, friendly, energetic, team players with a strong work ethic. Confidence and optimism are desirable traits for your front desk staff.

Hint for Success: Consider hiring at least one “confident extrovert”

- This may seem like an odd suggestion, but a large part of the role of a receptionist is communicating with people.
- An extrovert will be happier to have to communicate with your patients. If they also have confidence, they will be much more assertive when delivering the “tough messages.”

Next priority: Ability to multitask and work in a high-volume, fast paced environment.

- This job requires requesting payments from patients and occasional discussions with patients regarding their financial situations. Ensure the person you hire will be comfortable with this.
- Prior experience in working with the public is helpful
  - Examples: Bank tellers, retail sales people, customer service representatives
Hiring the Right Staff

Other desirable traits:

• A “fit” with the rest of the current team
  — Important for a positive work environment

• Prior experience in dentistry
  — But be willing to train the right person. (They can learn this as long as you give them formal training and the support they need)

• Language skills that mirror your patient population
  — Don’t hire someone only because they are bilingual. If your clinic needs a translator, hire a translator.
  — Never hire someone to work in the front desk without the skills and attributes needed to work.

Keeping the Right Staff

• The front desk tends to be a high-turnover area
  — “The front desk is one of the hardest jobs in the office...They take the brunt of the yelling from patients, much more than any other team member.” – DQ OHC Practice Manager.
  — Positions are usually among the lowest-paid in the CHC
  — We often throw people into these very challenging jobs without giving them the resources, support and leadership they need to be successful
  — And then we wonder when they get burned out, frustrated and leave.
Keeping the Right Staff

• Don’t undervalue these positions—these staff are CRUCIAL to the success of your department!

• Look at your hourly rates of pay.
  – Do a salary review of similar jobs in other fields in your region (eg, bank tellers, customer service representatives) and set your hourly rate high enough to attract -and retain- people from these fields
    • Salary.com is a free resource you can use

Keeping the Right Staff

• Re-engineer your front desk to create an environment that promotes success
• Provide all the training, resources, and tools your front desk staff need to be successful in their jobs
• Provide job performance reviews. Encourage positives, coach setbacks.
• Lead by example, and be the type of leader they would walk through fire for!
Keeping the Right Staff

• Set the front desk up for success:
  – Ensure good communication from the back to the front.
    • Utilize scheduling templates. Providers must teach the front how to best schedule appointments for them.
    • Providers must ensure that treatment plans are accurate and clear.
  – In larger offices designate a “lead” receptionist. All questions are filtered through this person to upper management.
  – Support your front desk by delivering and reinforcing “consistent messages” throughout the practice.
    • All staff need to be on the same page with all clinic policies.
    • Providers should remind patients of the importance of following all policies.

Start with These Questions:

• How are current operations at my front desk?
• Do the front desk staff’s understanding of their job expectations align with their official job descriptions?
• Are there enough FTE front desk staff to fulfill the needed duties?
Analyze Front Desk Operations

- Involve the front desk staff
- Develop a master list of everything FD staff does
- Solicit staff feedback—what’s working, what’s not working, suggestions for improvement
- Start at the door of the clinic and do a walk-through as a patient, documenting each step in the current workflow (activity and amount of staff time required). Do this for new patients, existing patients, emergency/walk-in patients
- Create flow charts defining the entire check-in and check-out process for each patient type

Define the Work

- Monitors and prepares daily schedule for dental staff
- Greets patients as they arrive in the dental clinic
- Makes appointments for patients according to the clinic’s scheduling policy; confirms appointments; follows up with "DNKAs/no shows" according to the clinic’s no-show policy
- Registers patients in clinic computer (verifying and updating name, address, phone numbers, employer, insurance status, etc.); corrects any registration errors
- Checks with insurer (electronically or by phone) to verify that the patient is covered by that insurance, coverage limitations and eligibility for the services to be provided. Checks to determine the patient’s co-payment responsibility
- For patients without insurance, collects documentation of income to establish eligibility for sliding fee scale discounts
- Assists patients in completing dental history, consent and financial forms, if necessary
- Request needed updates for all returning patients
- Checks out the patient; collects co-pays and outstanding balances on patient accounts
- Manages all aspects of the prior approval/authorization process—submits required documentation (via mail and/or computer as appropriate); monitors and tracks status of requests
- Triages walk-in or emergency patients in accordance with the clinic’s walk-in/emergency policy and works those who meet emergency criteria into open slots in the daily schedule; schedules future appointments as available for patients whose needs are not urgent or emergent
- Makes reminder calls to patients with upcoming appointments
- Reconciles daily payments and prepares deposits
- Performs photocopying and other clerical duties
- Manages inventory of non-clinical office supplies; orders and restocks as necessary
- Opens and distributes mail
- Other duties as assigned!!!!!
Thinking Outside the Box

• If your front desk is understaffed and needs to cut corners to keep up, you may need to restructure the work.
• In collaboration with the front desk staff, evaluate the work and designate three priority levels
  – Level One Tasks: Greatest impact on customer service and financial sustainability. MUST be done by front desk.
  – Level Two Tasks: Important but could be done by a staff member other than the front desk staff
  – Level Three Tasks: Need to be done, but again, is it the best use of front desk staff time?
• Brainstorm how best to use all the possible resources available to get the work done (both within the dental department and within the overall health center)

Prioritize the Work

• Sample Level One Tasks:
  – Greets patients and alerts staff of their arrival
  – Ensures all patient forms are signed and up-to-date
  – Collects complete and accurate patient demographics; corrects registration errors in system;
  – Checks with insurer to verify that patient is covered by that insurance, coverage limitations and eligibility for services to be provided
  – Determines insured patients’ co-payment responsibility
  – Collects patient payments (insurance co-pays and self-pay charges)
  – Answers phones and all patient questions
  – Schedules appointments according to clinic policy
  – Monitors the schedule, ensuring the chairs are always full
Prioritize the Work

• Sample Level Two Tasks
  – Triages emergencies and walk-ins
  – Makes reminder calls to patients with upcoming appointments
  – Documents and manages DNKAs according to clinic’s no-show policy
  – For uninsured patients, collects documentation of income to establish eligibility for sliding fee scale discounts
  – Assists new patients in completing dental history, consent, privacy and financial forms
  – Manages the prior authorization process—submits required documentation, tracks status of requests, schedules patients when approval received

Prioritize the Work

• Sample Level Three Tasks
  – Reconciles daily payments and prepares deposits
  – Performs scanning and other clerical duties
  – Manages inventory of non-clinical office supplies
  – Orders and restocks as necessary
  – Opens and distributes mail
  – Other duties as assigned
Sample Strategies

- Are there any CHC departments that can take over any of the work?
  - Perhaps a centralized patient accounts center would be able to register new patients.
  - Consider requiring new non-emergent patients to come in ahead of time to fill out all required paperwork, provide proof of insurance status, bring documentation of income for determination of eligibility for the sliding fee scale and review your principles of practice (payment policy, no-show policy, etc.)
- Consider creating a front desk coordinator position to oversee front desk operations as the “lead receptionist,” carry out the Level Two and Three tasks and fill in where needed (eg, vacations, sick days, crunch times, etc.)

Sample Strategies

- Consider designating a dental assistant to triage emergencies and walk-ins (they understand dentistry and also know what’s going on in the treatment area at any given moment in the day)
- Investigate a service like TeleVox, Smile Reminder, or Solution Reach to make reminder calls
  - Some services also send customer satisfaction surveys
Resolving Issues

In this next section we will discuss what to do if our front desk staff are not meeting our expectations.

Why People Don’t Do Their Jobs Well

1. Ability (skills, competence, resources)
   - They don’t have the right skills to do their job
   - They don’t know how to do their job
     - Lack of education, training, systems
   - They don’t know what needs to be done
     - Lack of clarity, expectations
   - They don’t have what they need to do their jobs
     - Lack of tools, resources, time, support
Why People Don’t Do Their Jobs Well

2. Willingness (motivation)
   • They are content to get by with the least effort possible
   • They started out on the right foot but have lost their way

3. Accountability
   • They are not being held accountable for their job performance
   • There no clear job expectation or performance standards

Fundamental Truths

• Job Performance Matters
  – Good performers need to be consistently recognized and rewarded
  – Mediocre performers need to be coached, motivated and supported to do better
  – Poor performers need to be given the opportunity to step up, and if that doesn’t happen, they need to step out

• Train them, Train them again, Try a different approach to train them, Trade them.
Resolving Ability Issues

• They don’t have the right skills to do their job
  • Can their skill set be used in a different area?

• They don’t know how to do the job
  • Train, train, train! Formal orientation, job shadowing, periodic reviews and in-services as needed

• They don’t know what needs to be done
  • Review job descriptions, provide checklists, review procedures manuals

• They don’t have what they need to do their jobs
  • Determine what they need and, if at all possible, give it to them! Are there enough people in the front to do the work?
Resolving Ability Issues

• **Get to Know Your Front Desk Staff!**
• **Have one on one meetings:**
  – Find out what they like and dislike about their job
  – What do you think they are good at? What do you think they need coaching with?
  – What do they think they are good at? What do they think they need coaching with?
  – Who are they and where are they coming from? The more you know about them, the better your chances of understanding what drives their behavior

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Resolving Ability Issues

• **Develop management strategies for each individual staff person**
  – Example: If you have a staff person who struggles to master new technology, understand that whenever new technology is introduced, this employee will need more time, one-on-one instruction, support, and encouragement to gain comfort and proficiency

• **To the extent possible, put staff in jobs that utilize their strengths and minimize their weaknesses**
  – Example: If you have a staff person who absolutely hates confrontation, don’t make that person deal with aggressive patients; rather assign that task to someone who is assertive enough to stick to departmental policies and won’t be bullied into bending the rules

• **Having said that, cross-train all of your staff so that everyone knows how to do everyone else’s job**
Quotable Quotes:

“Everyone has peak performance potential—you just need to know where they are coming from and meet them there.”

Ken Blanchard
Resolving Willingness Issues

• They are content to get by with the least effort possible
• They started out on the right foot but have lost their way

This is when your leadership skills will be tested!

“If your actions inspire others to dream more, learn more, do more and become more, you are a leader.”

John Quincy Adams
6th U.S. President

Motivational “Do’s” for Front Desk Staff

• Do create an atmosphere of trust
• Do acknowledge good work often
• Do make people feel good about their work
• Do show them why their work is important
• Do make a big deal of special achievements and accomplishments
• Do make employees part of a team and foster cooperation
• Do watch out for problems caused by difficult employees and take action
• Do build employees’ self-esteem by using praise instead of criticism
• Do look for ways to have fun
Quotable Quotes:

“Motivation is the art of getting people to do what you want them to do because they want to do it.”

Dwight D. Eisenhower
U.S. General and President

Resolving Accountability Issues
Resolving Accountability Issues

Leadership:

• Lead by example—model the behaviors and performance you expect from your staff
• Foster open and direct two-way communication—empower staff to speak directly with each other and you; be willing to accept their feedback without getting defensive
• Become an active listener; talk with them, not at them
• The ability of the front desk staff and leadership to confront and deal with issues is crucial to success

Resolving Accountability Issues

• Be crystal clear about job performance expectations—this should be in writing in their job descriptions and discussed during one-on-one job reviews.
  – Don’t ignore poor performance; it must be addressed immediately and consistently. (Coach privately)
  – But never focus only on poor performance: “catch” your staff when they do something good, and praise, praise, praise!
Resolving Accountability Issues

Recommended Front Desk Performance Evaluation Measures:

• **Amount of money in accounts receivable due past 90 days**
  - Reflects performance in collecting patient payments (including coinsurance payments) at the time of the visit

• **Number of denied claims due to patient ineligibility**
  - Reflects performance in determination of patient eligibility for insurance coverage

• **No show rate**
  - Reflects performance in communicating and enforcing the broken appointment policy

• **Number of unfilled appointment slots**
  - Reflects performance in monitoring the schedule and diligence in reappointing patients

Resolving Accountability Issues

• **Track, monitor, and respond to performance evaluation measures**
  - Work with the IT and finance departments to be able to obtain these performance evaluation reports on a regular basis (Ex: monthly or quarterly)
  - Review and share results with front desk staff during reviews
  - Develop short-term action plans for performance issues
Set Your Front Desk Staff Up For Success

Dealing with Difficult Patients

• Nothing challenges and stresses out front desk staff more than angry, difficult, or disruptive patients
  – Unfortunately, we have all had patients come to us with “chips” on their shoulders and feelings of persecution, or patients who have learned they can get their way by bullying or berating staff

• The best way to defend against difficult patients is to have policies and procedures defining all operations, communicate them clearly to staff and patients, and enforce them consistently (gently but firmly)
Scripting

• Scripting creates consistency in messaging, which improves patient understanding and compliance.
• It can also increase front desk staff’s comfort and success in communicating with patients.
• Involve front desk staff in creating scripting for important communications with patients—they need to be comfortable with the messaging.
• We will discuss tips and suggestions for creating scripting in the next several slides. Remember it is important that your leadership team creates scripting that is clear, sensitive, and culturally appropriate to the patient population in your location.

Scripting Tips

1. Acknowledge patients’ feelings without dwelling on them. It’s important to note that acknowledging their feelings doesn’t mean you necessarily agree with why they are upset
2. Be empathetic but then refocus on the issue at hand
   “Mrs. Jones, I can see that you are frustrated about having to wait three weeks for your next appointment. (acknowledgment of feelings) Let’s see what we can do to try and get you in sooner.” (refocus on solving problem)
Scripting Tips

3. Apologize if you or someone else has made an error or inconvenienced the patient.
   “Mr. Smith, I am so sorry that we had to cancel your appointment today (apology). Your dentist is sick, and we did not want to risk your getting sick, too. (explanation) Let’s find another appointment time that works for you.” (focus on solving problem)

Scripting Tips

4. Explain relevant policies or procedures in a simple, factual, and non-judgmental way so that the patient understands the reason for the policy.
   • Patients should know that our policies are not arbitrary, and they are consistently enforced to ALL patients.
   “Mrs. Jones, I understand you are upset that you have been dismissed from the practice (acknowledgment of feelings), but there truly is nothing I can do about the situation. When you became a patient of our practice, you agreed in writing to abide by our no-show policy, and you have repeatedly failed to keep your scheduled dental appointments. At our clinic, we only have a limited number of dental appointments each day. We have far more patients with serious dental problems than appointment slots available. For that reason, we must reserve those valuable appointment for patients who will respect and abide by our no-show policy. In order to be fair and treat all our patients equally, we cannot make exceptions for anyone. (explanation) I’m sorry, but I’m afraid I can’t help you.”
Scripting Tips

5. Isolate the disruptive patient who may be “playing to the crowd” by inviting them to talk with you in a quiet area. Use respect for their privacy as the reason for removing them.

“Mr. Smith, I can see that you are upset (acknowledgment of feelings). To protect your privacy, let’s go talk about this in our patient consultation room.”

Scripting Tips

6. When patients continue to argue and keep going over and over the same ground, continue to acknowledge their feelings but stay on message.

“Mrs. Jones, I know this upsets you (acknowledgment of feelings), but when patients are more than 10 minutes late for their scheduled appointment, we have to remove the appointment from the schedule. Otherwise, our providers will fall behind, and patients who showed up on time for their appointments would end up having to wait to be seen (explanation). I’m sure you can see that that wouldn’t be fair. You have two options: if you can wait, we will work you back into the schedule today as soon as an opening appears. But if you can’t wait, we can make an appointment for you on another day. Which option would work best for you? (giving the patient a choice)”
Scripting Tips

7. No matter what, keep your emotions in check. Responding in kind to patients who are rude or insulting will only escalate the situation. Acknowledge their feelings and refocus on the problem at hand.

8. Set limits (in a calm tone) with patients who use foul language.

   “Mr. Smith, I can see that you are very upset (acknowledgment of feelings), but I can’t help you if you are going to be verbally abusive to me. If you don’t stop swearing, I will have to end this conversation (setting limits). It’s up to you whether you would like to continue.” (giving the patient a choice)

9. No matter how difficult the interaction has been, end it on a positive note and provide a summary of what was discussed.

   “Mrs. Jones, I appreciate your bringing this problem to our attention so we could help resolve it. You told us that you didn’t get the message left on your home phone and that is why you missed your appointment. We have marked your cell phone in our computer as the number to call for your future courtesy reminder calls. Thank you for allowing us to review our no-show policy with you. This incident is exactly why we allow one missed appointment before the policy goes into effect. Now that we have the best number to reach you at and we’ve had the chance to discuss this together I’m sure there won’t be any problems in the future.”
Support Your Front Desk with Customer Service Tips

The Basic Tenets of Good Front Desk Customer Service Skills

#1 Be An Active Listener

- What is the patient saying?
- What is their tone of voice?
- What is their body language?
- What feelings are they expressing?
- Don’t tune out...stay actively engaged in hearing what the patient is saying. Don’t multitask and don’t be thinking about what you are going to say as soon as the patient stops talking!
- Active listening tells the patient that what they have to say matters to you
The Tenets

#2 Be Proactive and Helpful
- Try and anticipate the patient’s needs and be ready to meet those needs
- If a patient needs help, offer it, even if it’s not technically “your job”
- Use positive language—“I can help you with that”
- Be honest and realistic about what you can do to help and always follow through on all promises of help that you make
- If there is a problem, be ready with a solution (or at least an acknowledgment of the problem and an offer to help the patient resolve it)

The Tenets

#3 Make Patients Feel Welcome and Valued
- Make an effort to learn who they are and greet them warmly and sincerely (“Mrs. Jones, how nice to see you again!”)
- Treat patients with interest, respect and compassion
- Thank patients for entrusting us with their care (“Thank you for coming in today. We’re so happy to see you and take care of you”)
- When the patient leaves, say goodbye warmly and sincerely (“Goodbye, Mrs. Jones, have a great day!”)
- Be aware of your body language and facial expressions—be open and welcoming
The Tenets

#4 Help Patients Understand Our Policies and Procedures

- Using simple language, develop scripting to explain important policies and why they need to be followed (ex: no-show, cancellation and payment policies)
- Post signage in clear view
- Create handouts explaining policies for all new patients
  - Request patients to initial key points in the policy and sign after reading and initialing it.

#5 Understand and Evaluate the Patient’s Experience

- Stand at the door of your clinic and look around as though you were a brand new patient:
  - Is the waiting room clean and uncluttered?
  - Are the walls nicely painted?
  - Is there pleasant artwork on the walls?
  - Are the waiting room chairs clean and free of stains?
  - If there are rugs on the floor, are they clean and stain-free?
  - Is there up-to-date reading material?
  - Are there toys or activities to keep children entertained?
  - Is signage present and legible?
The Tenets
#5 Understand The Patient Experience (cont.)

➢ Approach the front desk
  - Can front desk staff clearly see and be seen?
  - What does the work area look like? Is it neat and uncluttered?
  - Is there a way to ensure patient privacy?

➢ Look at your front desk staff with a critical eye
  - Are they dressed neatly and appropriately?
  - Do they appear friendly and approachable?

The Tenets
#5 Understand The Patient Experience (cont.)

➢ Listen to your front desk staff communicate with patients
  - Do the staff members understand company policies and clearly communicate them to our patients?
  - How do they deliver messages to our patients? Is their approach respectful, culturally sensitive, confidential, and appropriate?
  - Is their demeanor professional and courteous?
The Tenets

#6 Solicit Feedback From Patients

- Patient satisfaction surveys
- Focus groups
- Random phone calls to patients to ask about their recent experience
- Mystery shoppers

- Remember it is not enough to solicit feedback—we need to act on the feedback we receive

The Tenets

#7 Good Customer Service is a Continuous Process

“You will never be known for great customer service if it only happens once in a while.”

Jeff Hargett, Ritz-Carlton Leadership Center
Discussion:

• Any questions, comments, or suggestions to share with the group?

Partnering to Strengthen and Preserve the Oral Health Safety Net