OMG! Academy: <u>The Foundations</u>

Treatment Acceptance Action Guide

Congratulations! You have purchased our Treatment Acceptance Module and are now ready to dive into some great information. Here in Treatment Acceptance we will help you understand why it is a team event and how you can get there with your team. Ready, set, go!

This Module is comprised of 6 Parts:
Part 1: Educating the patient so they understand the importance of the treatment proposed
Part 2: Treatment plan presentations
Part 3: Financial agreements and options
Part 4: Following up with patients regarding any unscheduled treatment
Part 5: Efficient Claim Submission
Part 6: Conflict Resolution 101

After completing this Module, you will have…

- ✓ The verbiage needed to educate patients regarding their treatment
- ✓ An understanding of how to properly present a treatment plan
- ✓ The importance of a variety of financial options to offer your patients
- ✓ An easy to follow system for following up on outstanding and unscheduled treatment
- ✓ An understanding of what is required to receive prompt payment from the insurance companies
- ✓ An ironclad insurance system that will ensure successful claim submission and payment

OMG! Office Management Guide® Academy
Take your practice to the next level

Successful treatment planning involves everyone in your practice, from the person who first speaks to the patient on the phone, to the clinical team, to the treatment coordinator to getting the patient scheduled … it's a total team effort!

As clinicians, the dental team views the treatment as the primary concern when presenting treatment plans to the patient. As a consumer, patients need to know the benefit when deciding on need vs want. As professionals, we need to present the topic as a course of action that will provide benefit to the patient.

Part 1 Patient Education

One of the most parts of a treatment plan is the education the patient is receiving regarding the treatment needed. Following are a few things to remember:

- **Education should take place in the operatory by the clinical team**—they are the team members of the practice that understand why the treatment is necessary and the importance of having it completed
- **Education is about the "WHY"**—explain this in terms the patient is going to understand so they WANT the treatment and understand the NEED
- **Build relationships**—it is important to build a positive relationship with your patients when communicating their treatment
- **Keep it simple**—Do not get too technical. Refrain from using words like "core build-up" or "root planing". Patients do not know our dental terminology.

Part 2 Treatment Plan Presentations

How do the treatment plans you are presenting look? Are they easy to read? Easy to understand? Keep these items in mind when you are presenting your treatment plans to your patients:

- **Readability—**we see many treatment plans that are very confusing to read (If they are confusing to us, imagine how confusing they are to the patient)
  1. Procedures should be listed in a well-ordered manner—preferably in visit order so patients know what is expected at each appointment
  2. It should be clearly listed the treatment fee as well as the patient's portion of that fee.
  3. There should not be scribbles on the form. Your practice management software should be able to print the patient's deductible and portion without the admin team having to write and scratch out the information.
- **Communicating the plan—**when the treatment plan is presented to the patient by the administrative team the patient should already understand the need for the treatment on the plan. Therefore, this should be fairly simple and to the point. If the patient has additional questions regarding why they need the treatment, it is best to get someone from the clinical team to explain it.

Part 3 Financial Agreements and Options

What financial arrangements are available in your practice? Do you know? This is an important element to presenting treatment plans to your patients. By the time we are talking finances, the patients should be at the **WHY** they need the treatment—we now need to help them with **HOW** they will do it.

A financial policy is a must in your practice. Following are a few items to consider when creating your policy:

- **Put it in writing—**all payment options should be transparent, and it is extremely important that you stick to those options.
- **Types of payments accepted**
  1. Check or cash
  2. Credit cards
  3. Third party financing
- **Incentives?** —Do you want to offer incentives if patients pre-pay or pay in full? This needs to be in your policy as well
- **Standard Procedure—**patients should never be seen for treatment until a financial arrangement has been made

An important thing to remember when you are creating financial arrangements with patients is that you are NOT a bank! Please do not put yourself in the position of chasing people down to pay you.

Part 4 Unscheduled Treatment Follow-up

Unfortunately, patients occasionally fall through the cracks and do not get the treatment they need done. How do we handle those patients? We need to call these patients and get them back on our schedules. This is an extremely important job in any dental office.

- **Who is calling?** —first and foremost we must know who is responsible for calling the patients without appointments. This could be anyone in the practice, but is important to have one or two people that are held accountable for the task getting completed
- **Create the list of patients with unscheduled treatment**—your practice management system should have a report with a list of patients that have been treatment planned and do not have an appointment.
- **Making the call**—these calls are going to take a little bit of homework before the actual call is made. Here are some steps to follow:
  1. Locate the patient's chart and identify the treatment needed
  2. Ensure you understand the treatment in case the patient asks you any questions about it
  3. Ensure the patient does not have an appointment on the schedule (they could have an appointment for something other than the unscheduled treatment listed)
  4. Make your call using the following verbiage:

"Hello. This is Jackie from Dr. Molar's office may I speak with PATIENT NAME. (Once pt is on the phone) Hi PATIENT NAME. Dr. Molar wanted me to call you to schedule your crown/implant/filling appt. He/She is concerned that …… (fill in the gap with what

the Tx is and how it could get worse; no pain, deeper decay, etc.). When is a good time for you?"

If a message is required:

"Hello Mrs. Smith. This is Jackie from Dr. Molar's office. I am calling about your appointment on Monday. Please give our office a call at 123-456-7890."

- **Create a protocol**—it is important to have a system and schedule of when the unscheduled treatment calls are going to occur in your practice. The following is an example of a protocol that may work for you:
  - ✓ 1st call-1 week after cancellation or the treatment was not scheduled
  - ✓ 2nd call-1 month later
  - ✓ 3rd call-3 months later
  - ✓ If patient still does not schedule, no further phone calls will be made and treatment will be discussed at the patient's next recall

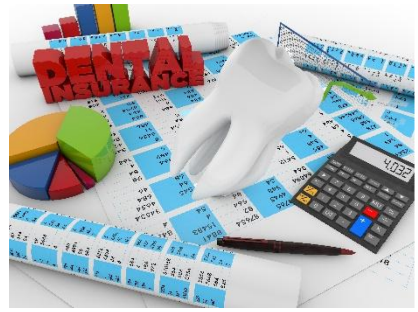
Part 5 Efficient Claim Submission

An active pre-appointing system is far more productive and creates a superior recall

Send the claim correctly the 1st time. Don't laugh! It happens all the time – sending off the claim with fingers crossed or even insurance coordinators that try to 'fight' the system by not sending x-rays or other information until it is requested. Who is that really hurting?

Most electronic claims clearinghouses will warn you if an insurance company requires additional information for specific procedures. It's advisable to heed the warnings.

Here are some tips for proper claim submission:



As a rule of thumb:
Send x-rays on:

- ✔ All crowns
- ✔ Implants
- ✔ Root canals (pre & post)
- ✔ Scaling & root planning

- SRPs will require a **perio chart**.

- **Narratives need to accompany major treatment –** this information should be in the clinical notes for ease of accessibility. When putting the narrative on a claim, remember that only 150 character spaces will be submitted electronically in 'Remarks for Unusual Services' box.

Keep a list handy of narratives that your doctor uses frequently.

- **Additional information needed -**
  All crowns –
  - ✔ Initial or replacement crown (replacement date)
  - ✔ Seat date

This is the tricky part. You are not allowed to 'guess' or make up a date. If the initial crown was not completed in your office, you need to ask the patient how long he/she has had the crown. By explaining to the patient that their insurance will not pay on the crown unless you give a date for the initial crown, the patient is more likely to work with you. You may need to jog their memory by asking questions (Were you married? How old was your child? Was it before 2000?)

Ideally this information should be included in the clinical notes, so make it part of the clinical notes template.

Finally, there are insurance companies that will only pay on a crown once the permanent crown is seated. Again, keep track of that so you can submit that information as soon as it occurs. We recommend that you document it on the 'crown seat' appointment. Many times, they will accept the seat date over the phone and will send the claim on for final processing.

Part 6 Conflict Resolution 101

Every office has conflict, but not every office handles it the same way. This is why it is a subject that we like to bring up in all of our workshops. We all have diverse personalities and communicate in unique ways. These differences in our personalities are what make conflict resolution an uncomfortable and touchy subject.

5 Conflict Management Strategies:

1- Accommodate

2- Avoid

3- Collaborate

4- Compromise
5- Compete

What is your dominant conflict strategy?

Do you ever change your strategy?

We suggest the following ground rules.

Step One: The two parties must meet face-to-face

Step Two: Set the Ground Rules

Step Three: Agree to the Problem

Step Four: Brainstorm on possible solutions

Step Five: Decide on a Solution

Having conflict in an office is ok; in fact, it's actually healthy. However, preventing conflict from turning into heated conflict is crucial to avoid division in an office. If a resolution cannot be found with the two parties sitting down and talking it out, then it is time to bring in a mediator. Oftentimes this will be the doctor or the office manager. Whoever it is, they need to remain as neutral as Switzerland. The mediator cannot and should not pick sides, and the same ground rules apply. We all want to work in a happy peaceful environment, so let's talk it out.

Your OMG! Academy Coaches

We are pleased to introduce to you the GTS coaches that will be presenting the courses to you.

Janice Janssen, RDH, CFE – Senior Consultant
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When it comes to working at a dental practice, **Janice Janssen** has seen and done it all. Since her introduction into the field as a teen, she has worked as a dental hygienist and in other roles including office management, insurance billing, and collections. As co-founder of Global Team Solutions (GTS), Janice enjoys consulting because it allows her to share her techniques with the doctors, hygienists, and office staff who are on the front line every day. Her zeal for a proven successful periodontal program makes her a real asset to her clients across the country. She is the current treasurer of the Academy of Dental Management Consultants (ADMC), and is a Certified Fraud Examiner (CFE), which positions her as an expert dental practice fraud and embezzlement.

Denise Ciardello - Senior Consultant
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Denise Ciardello always knew she wanted to be an entrepreneur. And today she is co-founder of Global Team Solutions (GTS), a practice management-consulting firm. She is also a professional speaker and published author who brings experience, insight, and creativity into her consulting, along with a sense of humor. Denise's industry distinctions include serving as president of the Academy of Dental Management Consultants and membership in the National Speakers Association, Toastmasters International, and Directory of Dental Speakers.

Christopher Ciardello - Consultant
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As a practice management consultant with Global Team Solutions, **Chris Ciardello** is passionate about sharing his expertise in the areas of technology and marketing as it pertains to the dental office. Chris has a distinctive knack for understanding the needs of an office and he communicates those needs to the team, which creates a cohesive, productive atmosphere. He began his career in dentistry as an office manager after graduating from the University of Texas, San Antonio with a BA in marketing. Chris is a member of the Academy of Dental Management Consultants.