

New Patient Flowsheet for Open Dental

1. New Patient Recruitment:
 - a. Half from internet
 - i. Good website
 1. no paid adwords or advertising; just good free SEO
 2. ~\$50 per month max
 - b. Half from existing patients
 - i. Be sure to send thank you letters
2. New Patient Calls:
 - a. Track all NP phone calls with "Incoming Call Report" (<http://hrdsq.com/>)
 - b. NP phone call: "Get 'em in the office!"
 - i. Telephone checklist – 7 steps for success with NP calls
 1. Name
 2. Daytime phone (cell)
 3. **Email**
3. Email welcome letter with WebForms (<http://opendental.com/>) – immediately!
 - a. Monitor WebForms; if no forms within 24 hours, send "WebForms reminder" email
 - b. Monitor WebForms: if no response 48 hours after scheduling, call patient ("call patients, not insurance companies!")
 - c. Evaluate and import WebForms; Last visit? X-rays? Exam?
4. Insurance?:
 - a. DentalXChange / ClaimsConnect (<http://www.dentalxchange.com/home/Home>):
 - i. Eligibility: need proper name, ssn, birthday, name of carrier
 - ii. Eligible? Look at benefits and history
 - iii. Download pdf and same in Images
 - b. "Patient Express" from <http://hrdsq.com/> to track real time eligibility and benefits
 - c. Trojan (some geographic areas) (<http://www.trojanonline.com/>):
 - i. find the correct plan based on group number from ClaimsConnect and double check benefits against ClaimsConnect to be sure you have the correct Trojan plan
 - ii. If discrepancy, ClaimsConnect more likely to be accurate
 - iii. Import Trojan; scan Trojan notes; any reason to call insurance carrier?
 - d. Open Dental "request button"
 - e. If still missing needed information, insurance carrier website; very last resort is call to insurance carrier!
 - f. Set correct fee schedule(s) in insurance plan information; set ppo percentage (??)
5. Morning Meeting (8 minutes)
 - a. Morning Huddle and Daily Dashboard (<http://divergentdental.com/>):
 - b. Goal is to improve pt care, increase today's production, increase later production, and make the day run more smoothly
 - i. Birthdays
 - ii. New patients
 - iii. Missing information – make assignments
 - iv. Unscheduled treatment – make assignments



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- c. Routing slips:
 - i. Printed night before
 - ii. Used during Morning Meeting
 - iii. Used for written notes about patients and appointments
 - iv. Shredded at end of day
 - v. "Amount Due Today:" everyone knows where to find it and everyone collects!

- 6. Treatment plans entered at time of diagnosis
 - a. Chairside (tablet?)
 - b. "Quick" features
 - c. Treatment plan options
 - d. Treatment sequence
 - e. Planned appointment(s) checked by doctor

Payment Options 4 (<http://www.todaysdentalconsulting.com/>):

- a) All treatment more than \$400
- b) Printed, initialed, scanned
- c) Given to patient

- 7. Scheduling:
 - a. Planned appointments when Payment Options incomplete
 - b. Treatment always tied to appointment when scheduling
 - c. Post from the appointment book (chairside)
 - d. Provider columns
 - e. Two things all patients do before leaving the office

- 8. Charting progress notes:
 - a. Default notes, group notes and autonotes as checklists (chairside)
 - b. All charting (and all notes!):
 - i. Date-stamp
 - ii. Clear and concise
 - iii. "signed" with initials

- 9. Billing "fail-safes":
 - a. Providers check daysheet before leaving for the day
 - b. No insurance billed until daysheet initialed by providers!
 - c. No deposits to bank without Open Dental Deposit slips (see below)
 - d. Open Dental billing defaults determine which statements to be sent
 - e. "Auto-statements" sent to ClaimsConnect every week
 - f. Weekly reports and tasks

- 10. E-Claims (always! Never paper!)
 - a. Do not add additional information unless prompted by ClaimsConnect (<http://www.dentalxchange.com/home/Home>)
 - b. Use NEA FastAttach (<https://www.nea-fast.com/>) – collect documentation directly from progress notes in many cases



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11. Posting and Banking:

- a. Scan EOB's and checks before posting or separating checks - just as soon as you open the mail!
- b. Deposit slips every day!
- c. No cash or checks go to bank without deposit slip from Open Dental – ever!
- d. Credit card deposit slips need to be checked against credit card daily printout
- e. EFT's: deposit slip created but not necessary to print

12. Recare:

- a. Patient needs to understand benefits of recare (doctor, hygienists, staff)
- b. “Auto-recare” scheduling while patient in the office
- c. Unscheduled recare handled by Open Dental recare module – not by outside service!
- d. “Web Scheduling” <http://opendental.com/> (when properly setup) sent as email
- e. Postcards for patients who have not responded to other methods

13. Management by Reports:

- a. Dentists and Office Managers

