

# Professional Development

# Pearls



## ***The Team Approach To Patient Care Coordination: What Matters Most And Why***

***By: Jamie Schoessling***

### ***Evaluating Your Current Level Of Interaction With Other Practices***

Dental offices typically have a desk drawer full of clinician referral pads. There are a variety of clinicians to choose from, however, the tendency is to reach for the same names time and time again. This is usually dictated by the relationships clinicians have established with their fellow dental professionals. Over time, clinicians become familiar with each other's professional skills and establish a comfortable and trusting working relationship. While it is desirable to become comfortable working with each other, caution should be taken to not become too complacent in our professional relationships. When we become too complacent in our relationships, we may inhibit the opportunities for continued growth and learning.

It's not just the clinician we work for who needs to continuously seek opportunities to build new relationships. As Implant Treatment Coordinators, it is also our responsibility to get to know the different clinicians and their staffs. These relationships are important to all involved. If being more involved with other practices to improve patient care is a goal you are working towards, there are two things you will need to focus on: building relationships with clinicians and their staffs and improving the coordination of patient care.





## ***Building Lasting Relationships With Clinicians And Their Staffs***

In order to build and maintain a strong referral network, an Implant Treatment Coordinator should actively seek opportunities to develop new relationships with clinicians and their staff members. First, locate your clinician referral pads. Second, create a list of all referring clinicians. You will likely discover that you have access to a large number of different practices with a variety of specialties. Third, review the list with your clinician. Finally, you and the clinician you work for should prioritize the referring clinicians you wish to focus on.

A critical element for success in the relationship building process is getting to know each clinician and their staff members. In order to accomplish this, you should go to their office and introduce yourself to the staff and the clinician. Be sure they know that you will personally take the lead role in coordinating each patient's care. Don't forget to leave behind your professional business card that has your title, business telephone number and your business email address.



Next, create a plan to have frequent communication and interaction with each practice. Using your list as a guide, you can begin by scheduling a group meeting between the clinician you work for, yourself and the referring clinician's Implant Treatment Coordinator or Office Manager. Position the meeting as an opportunity that will benefit all attendees. At these meetings, I recommend that you ask a series of questions aimed at discovering their needs and meeting their expectations:

- 1. What are the office hours?***
- 2. Are there multiple office locations?***
- 3. If yes, which doctors are at what locations?***
- 4. Who is the main point of contact for each location?***
- 5. Is there a private number or backline number for easier access?***
- 6. What is the preferred method for managing correspondence with the practice?***
- 7. What are their requirements when scheduling a new patient?***
- 8. What are the requirements for consultation patients? Is there a consultation fee, referral slip, FMX, panorex, cephalogram or tomogram?***
- 9. What imaging capabilities does this practice have? Do they prefer to coordinate the diagnostic radiographs and study models themselves?***
- 10. If clinicians from multiple locations are needed for the consultation, what is the preferred location for that consultation? Who will coordinate the appointment with the patient?***
- 11. What are the clinicians' preferred days and times for reviewing cases?***
- 12. Are they available to see patients in the evenings or on Saturdays?***
- 13. Do they have reserved times for emergency patients? If so, what are these times?***
- 14. Are they open for lunch or do they go on service?***
- 15. Who is the after-hours point of contact?***

The goal for these meetings is to get to know the requirements of any given practice. During these meetings, take advantage of the opportunity to exchange thoughts and expectations regarding the coordination of patient care. Keep sufficient notes and file these in a folder dedicated to that practice. Once you have all the information you need for a successful relationship and patient experience, be sure that you stay current with this practice so that the patient care coordination process will go smoothly for the patient and the team.

## ***Steps For Improving Patient Care Coordination***

When a new patient is referred to your practice, you should take several key steps to ensure that their care is coordinated efficiently and that their experiences are personalized. First, confirm that you have all of the patient's information and records available prior to the appointment. Next, plan to attend or participate in the initial patient consultation. The patient will greatly appreciate having a dedicated Implant Treatment Coordinator there for the consultation.



At the consultation appointment, introduce yourself as the patient's liaison; explaining that you will support him/her during their care by coordinating with the clinician and providing additional education or information. Your participation in the consultation will put you in the position of knowing what was discussed with the patient. Additionally, you will gain valuable information about the patient such as why the patient is consulting with the clinician you work for, their previous dental experiences, as well as the patient's expectations and concerns.

After this information has been gathered and the records created, schedule the patient consultation for the treatment plan presentation. Create the patient's treatment plan letter, which should include the following:

- ***The recommended treatment plan(s)***
- ***The expected length of treatment***
- ***A list of team members and clinicians involved in the treatment plan and their respective roles***

This letter will be presented to the patient during his or her treatment plan presentation and copies of the letter should be placed in the patient record and sent to all doctors involved in that patient's care.

Create and keep an ongoing dated log in the patient record. This log can be used in the following ways:

- ***To keep track of the recommended treatment options and the names of the clinicians' offices***
- ***To post where the patient is referred to, appointment dates and specific treatments***
- ***To capture who scheduled the appointments***
- ***To record the patient visits with all clinicians and the outcomes of those visits***

When the patient's treatment is completed, consider asking him/her to provide you with feedback about the experience and ask if this may be used as a testimonial. In addition, take final photographs. Send copies of the pre- and post-treatment photographs and the patient's testimonial to the clinicians with whom you have been coordinating the patient's care. They will appreciate seeing the results of great teamwork.

As the Implant Treatment Coordinator, you are the liaison between the patient and the treating clinician(s). No matter how many clinicians are involved in the patient's care, it is your role to be in charge of coordinating that care. If you do this well, the clinician, their staff and the patient will appreciate your efforts. They will come to enjoy working with you and the clinician. They will also have confidence that you are capable of managing patient care from start to finish.

Relationship building with clinicians and their staffs, as well as providing outstanding patient care coordination is a winning combination. You are in a position to facilitate these activities. Your skills are needed to help drive referrals to the clinician you work for and to make patients feel well-cared for. It's up to you to lead the team approach to patient care coordination.



## Jamie Schoessling

Ms. Jamie Schoessling has been a practicing dental hygienist for more than 20 years. She became the Implant Treatment Coordinator for Gary Morris, D.D.S. in 1993, shortly after he joined the practice of Robert Shiffman, D.D.S. in Buffalo Grove, Illinois. Today, she practices dental hygiene, coordinates all of

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