

The patient manager system: Increasing clinical efficiency while exceeding your patient's expectations



Lisa Alvetro

In an environment where orthodontic practices need to differentiate themselves, the patient manager system is an ideal strategy. It allows for very personalized customer service and a unique orthodontic experience for every patient and their family. In orthodontics, the patient manager system is an organizational strategy where each patient is paired with a clinical technician who will work with them throughout all stages of treatment. Each patient is assigned their own personal concierge, partnered with them from the beginning of treatment to the end, to ensure they achieve their treatment goals while having an exceptional experience. This system benefits not only patients, but doctors and staff as well, regardless of practice size. (Semin Orthod 2016; 22:270–274.) © 2016 Elsevier Inc. All rights reserved.

The concept of a patient manager system is not new in orthodontics, and has been advocated for years by orthodontists and consultants. Our current system has been in place over 10 years. We have experienced its positive effects on our practice, and encourage other practices to consider its implementation.

There are many versions of a patient manager system, and any practice can modify it to suit their individual needs. The basic premise is that every active patient in the office is paired with a clinical team member who becomes their patient manager, accompanying them throughout treatment. Quite simply, the clinical technician who is part of the initial bonding appointment will be the same technician the patient sees at every appointment for the duration of their treatment.

As a patient manager, the clinical technician's responsibilities are:

- (1) To review with the doctor each patient that they will be assigned to as a patient manager. Understanding the case and any particular challenges is important as well as the role they will play in a successful outcome.
- (2) To make sure any questions that patients or parents may have regarding treatment are answered, and that patients are comfortable with treatment.
- (3) To make themselves available to their patients by providing contact information. At the initial bonding appointment, the patient manager will give the patient their business card with their office email address and phone number, along with an open invitation to contact them with any questions or concerns.
- (4) To coordinate referrals to other dental professionals for their assigned patients and track patient follow through of referrals.
- (5) To review treatment progress with patient at each appointment by comparing initial records to current clinical presentation.
- (6) To update referring dentists and other involved dental professionals of patient's treatment progress through regular correspondence.
- (7) To track patient's progress through monthly reports, and investigate extended treatment times and potential causes and bring them to the doctor's attention.
- (8) To contact patients who have missed their appointments, or have failed to schedule next appointments, and assure that they are scheduled.
- (9) To do what is necessary to ensure that the patient is having a positive orthodontic experience.

Case Western Reserve University, Sidney, OH.

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The responsibilities of the entire office staff in regard to the patient manager system are:

- (1) At the initial appointment, treatment coordinators need to explain the system and its benefits to the patient and parent. The patient manager system can be used to differentiate the orthodontic practice, the level of care and attention to detail that it allows the practice to provide should be presented to the patient.
- (2) Scheduling coordinators must follow the template when scheduling, and must direct the patient/parent to the appropriate available appointment times.
- (3) Scheduling coordinators must understand the importance of keeping a patient with their manager, and have appropriate scripting to help patients understand the benefit as well.

Increased treatment efficiency is a benefit of a patient manager system

- (1) The specifics and special considerations of a case can be discussed between the orthodontist(s) and the patient manager. Each can be made aware of any special circumstances and can be proactive. This allows for doctor and patient manager to specifically plan treatment sequencing.
- (2) The manager knows the patient and the case so they can keep track of referrals and confirm that patients follow through with treatment recommendations.
- (3) Since the same technician is at every appointment, they know what was done at the last visit and what resulted. This allows them to predict and prepare for the next steps in treatment. Since the technician knows what will be done at the upcoming appointment, supplies can be prepared prior to the patient's arrival. Being able to predict and prepare increases chairside efficiency.
- (4) After working with a patient repeatedly, it is easier to predict future behavior such as compliance with elastics and oral hygiene. Systems that rate a patient's hygiene or compliance are more reliable when the patients are rated by the same technician.
- (5) Scheduling efficiency is increased. The "unexpected" is what is detrimental to our

clinical schedules. Since a patient manager is familiar with the patient and their family, they can best predict the amount of time that will be needed for a procedure and schedule accordingly. Based on past experience, the patient manager knows whether a longer or shorter appointment time may be needed for a specific procedure and patient. This allows for greater predictability, and in some cases even time savings, in our schedules.

- (6) Treatment progress is tracked. It is easier to identify why treatment is not progressing as it should since all the variables are known by the patient manager. Due to their existing relationship with the patient, the appropriate actions are easier to initiate.
- (7) Continuity of care is a benefit in situations where multiple orthodontists may be involved in a patient's treatment or in a situation where the orthodontist takes a leave of absence. In these situations the constant becomes the patient manager, who is familiar with the case and progress.

Patient manager systems have a positive effect on patients and their parents

- (1) Patients have a personalized experience because their manager can be focused on their special needs and respond accordingly. Every patient has different needs and goals and it is much easier to determine these with a patient manager system in place.
- (2) Increased sense of "feeling special" and developing a relationship with their patient manager. The manager and patient become a team with a common goal.
- (3) Clinical appointments are quicker because the manager is already familiar with the case. It reduces the need to ask the same questions or review the same information. Progress is easier to track.
- (4) Patients have someone they feel comfortable contacting with questions or concerns about their treatment, as patients tend to share more information with their patient manager than they would with the doctor. Better communication always results in increased patient satisfaction.

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