

Transition from Reception Area to Treatment Room

This brief interaction is an important transition that most medical and dental offices overlook. It must become part of your practice's culture that every patient is received like an old friend, with a smile and a warm greeting. This transition is especially important because the patient is getting their first glimpse at the back office team. The tone for the entire team-patient relationship can be guided by this initial impression.

The back office team member must take a quick pause and internally ask the following questions prior to calling the patient back to the treatment room:

1. How do I pronounce this patient's name? (If unsure, verify with the front office team members)
2. Is this a new or existing patient? (Check the patient record to verify)
3. How should I address this patient? (As a rule of thumb, our office addresses patients over 55 years old as Mr. or Ms.)

Procedure:

After the back office team member has answered the questions above, he/she will go to the reception area to call the patient back to the treatment room. The team member should enter the reception area with a smile on his/her face. The team member should then call out the patient's name. As the patient approaches the team member, the team member should wait until the patient is within arm's reach and extend their arm to shake the patient's hand.

New Patient:

Back Office Team Member: Hello Ms. Jones! Welcome to the practice! My name is (team member's name). I'll be working with you today. **(See new pt tour script)**

Existing Patient:

Back Office Team Member: Hello Ms. Jones! It's great to see you again. I'm going to take you back to the treatment area. *Note: One subtle distinction. Team members should try to avoid turning their back to the patient.* Rather than having the patient follow a team member who is walking ahead, it is much preferred to stand next to the patient and gesture with an open hand in the direction of the treatment room. The team member can then escort the patient to the treatment room by walking along side of the patient.

Back Office Team Member: Ms. Jones, we're going to be going into room number three right this way.

NEXT- Seating the Patient in the Tx Room