

Transition from the Treatment Room to the Front Office

Following the new patient exam and presentation of the treatment plan, the next step is to escort the patient back up to the front office team member for check- out and reappointment. The back office team member must “hand off” the patient to the front office team member. The patient should never be left alone to wait for a front office team member to help them. The “hand off” should be handled this way:

Back Office Team Member: (Front Office Team Member’s name), Mrs. Jones is all set to check out with you. Today we did a full mouth series of x-rays (example) as well as a new patient exam. Mrs. Jones is going to need an appointment with (Hygienist’s name) for her cleaning or an appointment with (Dr.’s name) for a buildup and crown on tooth number 19 (example). Mrs. Jones, it was so nice to meet and get to know you today. I’m going to leave with (Front Office Team Member’s name); she’ll take good care of you and check you out.

Note: The back office assistant should enter the day’s completed treatment into the practice software prior to escorting the patient to the front desk. Schedule any tx with the doctor, if time allows to avoid congestion up front.

Front Office Team Member: Great, thank you (Back Office Team Member). Did everything go well?

Mrs. Jones: Everything went great! I’ve never been to a dental office filled with so many friendly and caring people!

Front Office Team Member: I’m so glad you had a good experience! We would love to have more patients like you.

Mrs. Jones: I’d be thrilled to refer my friends and family to this office, you guys are great!

Front Office Team Member: Ok Mrs. Jones, let’s get those appointments scheduled...

Note: Use the funnel approach to schedule the next appt. example: Are you available next week? In the morning or afternoons? Early morning or late mornings? I have an 8:00am available, does that work for you?

Front Office Team Member: Great! We look forward to seeing you on (date). If you need anything between now and then, or have any questions- big or small- please don’t hesitate to give us a call!

