



THE TEAM

TRAINING INSTITUTE



FROM OUR TEAM TO YOURS

Rate the New Patient Experience in YOUR office

This should be a team effort. Rate this as honestly as possible, looking at each contact point as a New Patient would. Take each subject and break it down, dissect it and come up with a rating your team agrees on.

You are scoring your team 1-5 points. **5 points is Excellent** **4 points is Very good** **3 points is Good** **2 points is Fair** **1 point is Needs to improve**

NP Experience Contact Points

- | | Score |
|---|--------------|
| 1. Initial phone call (tone, helpfulness, closing) | _____ |
| 2. Confirmation call (same) | _____ |
| 3. First visual impression of the outside of the office | _____ |
| 4. First visual impression of the reception area | _____ |
| 5. Ambiance of the practice | _____ |
| 6. Smell | _____ |
| 7. Music | _____ |
| 8. Sounds audible to reception area | _____ |
| 9. Greeting the patient | _____ |
| 10. Gathering of information | _____ |
| 11. NP Forms (rate for timeliness, ease, valid info) | _____ |
| 12. Clinical staff greeting | _____ |
| 13. Appearance of team members uniform | _____ |
| 14. Appearance of team members teeth, esp. the Dr | _____ |
| 15. Personal grooming of team members | _____ |
| 16. Tour of the office | _____ |
| 17. Appearance of the equipment | _____ |
| 18. Appearance of the operatory, Dust or dirt | _____ |
| 19. Clutter | _____ |
| 20. Wall décor | _____ |
| 21. Appearance of the patient restroom | _____ |

Treatment

- | | |
|------------------------------------|-------|
| 22. Determining chief complaint | _____ |
| 23. Gathering personal information | _____ |

- 24. X-rays (rate equipment, and process) _____
- 25. Probing (painless, timely, charting info) _____
- 26. Computers in Operatories _____
- 27. Intra-oral camera _____
- 28. Diagnodent (every pt, every time?) _____
- 29. Cleaning itself (painful?) _____
- 30. OHI (is this constructive, or a lecture?) _____
- 31. Use of clinical technology _____
- 32. Fluoride treatment (every pt, every time?) _____
- 33. Fluoride treatment (good flavor etc?) _____
- 34. Looking for potential treatment _____
- 35. Preparing patient, presenting M,E,C before Dr enters _____
- 36. Introduction of the Dr _____
- 37. Verbal Handoff _____
- 38. Examination (timely, painless?) _____
- 39. Dr's communication skills _____
- 40. Simplification of explanation to pt _____
- 41. Resolving Chief Complaint _____
- 42. Summary of recommended treatment _____
- 43. Pre-scheduling of recall appointment (every pt every time?) _____
- 44. Asking for referrals _____
- 45. Handoff to front office staff _____
- 46. Financial discussion _____
- 47. Private place for financial consult _____
- 48. Comfort of financial consult area _____
- 49. Flexible financial options _____
- 50. Explanation of insurance benefits _____
- 51. How does the pt perceive our willingness to help with ins _____
- 52. Does the pt have our un-divided attention _____
- 53. Acceptance of financial options _____
- 54. Overcoming objections _____
- 55. Scheduling of restorative appointments _____
- 56. Appearance of appt cards _____
- 57. Welcome gift or take-aways from today's visit _____
- 58. Dismissal of patient _____

Post Appointment Experience

- 59. Thank you letter or phone call _____
- 60. Phone calls regarding questions about tx _____
- 61. Conflict resolution _____
- 62. Insurance questions/problems _____
- 63. Questions about statements _____
- 64. Post treatment discomfort _____
- 65. Collections procedures _____

Total Score: _____