



ORTHO2

# Final Treatment Reviews

A valuable marketing tool that is frequently underutilized is the Final Treatment Review. A carefully scripted Final Treatment Review will accomplish the following: Review what things looked like at the beginning of treatment, acknowledge the fact that the initial concern has been corrected, open dialogue for ways the practice can improve for future patients, and encourage satisfied patients to become marketing “champions” for the practice.

When the Doctor feels the patient is within a few visits of having their braces removed, a review would be scheduled on the same day as the regular adjustment. There are many ways to fit Final Treatment Reviews into your existing schedule. Some offices choose to train the clinical assistants to handle the entire visit and create a separate procedure code that is classified the same as a regular adjustment but with additional time allowed for the consultation. Other offices find it easier to schedule the consultation part of the visit in the Treatment Coordinator’s column and the regular adjustment in the clinic and therefore have two separate procedure codes.

## Getting Ready

Fortunately, ViewPoint makes it very easy to access and review all this information!

- Open the digital Pre-Treatment Photos or get photos from the chart.
- Check the ViewPoint Patient Record for the following: General Dentist on record, patients they have referred (from the Patient Record, click on View in the Shortcut Menu and select Referrals), and Findings including the Start Date and Estimated Length of Treatment.
- Review the Treatment Plan so you understand the treatment goals, as well as any complications and limitations.

by **Natalie Beaton**

- Review Chart notes or notepad comments for any problems that occurred during treatment.
- Review any notes regarding retention.

## The Script

The following script is an example that can be adapted to your practice. I have found that actually role playing a Final Treatment Review at a staff meeting can be a great way to get comfortable with the wording for the appointment.

“Dr. Wonderful feels that Johnny will be ready to have his braces removed in a few appointments. Here are photos of how things looked when we got started. Wow Johnny, your teeth have come a long way and the crowding you were worried about has really straightened out! I wanted to ask you both if you are happy with the results you are seeing.

“Sometimes there is a small turn of a tooth or some other little detail that is not affecting the clinical results but that you would like to see changed. **1. How do you feel about the way the teeth look?**

“I’d like to explain what to expect the day the braces are removed, the retainers that Johnny will be receiving, how they will need to be worn and their care... (Be sure to explain any lost/broken retainer fees and retainer visit policies at this time.)

“We also like to make sure that we met your expectations during orthodontic treatment and that you understood your treatment throughout your care. **2. Was there any part of the treatment that was unexpected or that you feel we could have explained in more detail?**

**“3. On a scale of one to ten, with one being terrible and ten being fantastic, how would you rate the quality of care Johnny received? (If answer is eight or above) That’s wonderful. I hope that the next time you’re in Dr. General Dentist’s office, you will share that with him. We see a lot**

of his patients and the only way he knows how things are going is if his patients share that information with him.

“We get some of our best recommendations for improvements from our patients. **4. If you could name one thing that we could change about the office, no matter how small, what would that be?**

“We have really enjoyed having your family as part of our practice and would love to have the opportunity to provide that same care to your friends. (Thank them for any previous referrals.) I wanted to let you know that even though Johnny is finishing the active stage of orthodontics, you can still participate in our referral program. If you refer any friends to our office, please be sure you ask them to let us know that they heard about the office from you. You will be sent a gift certificate to the mall as a small token of our thanks. **5. Do you have any other questions or concerns?**”

If the Final Treatment Review is handled by a Treatment Coordinator, they should be sure to communicate any treatment concerns to the clinical assistant prior to the patient being seen in the clinic. Reviewing comments or suggestions from Final Treatment Reviews at your monthly staff meeting will help you put that information to work improving the customer service your office provides.

The very first time a General Dentist mentions that a patient was in for their regular hygiene visit and mentioned how happy they were with your orthodontic practice or a new patient schedules because of a recommendation from a patient who has finished their care, the value of taking the time to review these few simple questions with your patients will be very clear! ☺

## About the Author



Working exclusively with Ortho2 clients, Ms. Beaton has a practice management focus that maximizes the use of the technology specific to ViewPoint software. Ms. Beaton's extensive knowledge of both the most current practice management trends and the ViewPoint system allows her to help any office to turn ideas into day- to-day reality.

Prior to forming her own consulting business, Ms. Beaton had over eighteen years of hands-on experience in both the orthodontic and dental industry in varied roles of treatment coordinator and financial administrator.