

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

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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; ■■■-■■■.) © 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.

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The responsibilities of the entire office staff in regard to the patient manger 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 manger 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 manger. 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 manger than they would with the doctor. Better communication always results in increased patient satisfaction.

- (5) Patients can be personality matched to a patient manager who best fits their communication style or behavior.
- (6) Patients, especially children, are more likely to be compliant because they know who is watching. It is much easier to claim you have worn your Class II elastics if you believe the clinical technician you are telling will have no idea whether or not you did.

Doctors work load is reduced in a patient manager system

(1) The orthodontic skill and knowledge base of the clinical staff will increase as they follow cases from start to finish. Managers will begin to know why they are doing procedures and the intended outcome. They will become better equipped to predict future steps in treatment.

(2) They will take pride in their work and will want to increase their skill level for the success of their patients.

(3) Due to the relationship and confidence that the patients have with their patient manager, many questions that may have been asked of the doctor can be handled by the patient manager. Most situations can be resolved without the involvement of the doctor.

(4) Skill levels of each patient manager can be matched with the complexity of a case. Less experienced technicians may be placed with easier cases that are in the initial stages of treatment until their skill level increases.

(5) Doctors can designate patient managers that are specialized in certain types of treatment or working with special needs individuals and personality types.

(6) Concerns that a patient may have about treatment but are uncomfortable discussing with the doctor are more likely brought to the patient manager. The patient manager can act as intermediary for the patient and doctor. The unsaid concerns are no longer left hanging in the air.

(7) The doctor does not have to be fully responsible for follow up and ensuring patient follow through with referrals.

(8) A patient manager's confidence and relationship with their patients make them more committed and a valued partner in the practice.

(9) The doctor has another skilled clinical technician monitoring each case who can alert them when treatment is not progressing as it should.

Positive effect of a patient manager system on staff

System leads to increased knowledge base of clinical staff

Consider this, if a clinical technician is part of the initial bonding appointment and all proceeding appointments throughout treatment, they get to experience the effect of every step taken by the orthodontist to achieve the final result. This allows for an understanding of the effects of an appliance system or procedure. In many practices, a clinical technician may assist in a procedure but never see what resulted because they are not part of the next appointment. As doctors, we get to see the results of our treatment. Imagine if every clinical staff member got that same opportunity to experience cases, from start to finish with every step included. The result would be a greater understanding of orthodontics and its processes.

They are no longer just doing what they are directed, but have a true understanding of what is being done and why, and what will result from its proper execution.

System as a learning and motivational tool

If a technician as a patient manager is seeing the results of her own work, she will see her own successes and failures. For example, one may be more likely to avoid contamination during a bonding procedure if they realize they will be the one who will repair the loose bracket. One is more likely to double check arch wire ends before dismissing a patient if they know it will be their responsibility to fix later.

System increases job satisfaction and commitment to the practice

If the clinical technician is a part of every step, they become a part of the final result. It gives them the same sense of pride that we as orthodontists feel when we have completed a case. Knowing that they are an integral part of a patient's treatment makes them committed to their patients as well as the practice. They know

exactly who is depending on them to be there and be at their best.

Patient manager systems increase confidence

The confidence of your staff increases because they can answer questions about a patient's treatment or review progress with a patient or parent in an intelligent and informed manner. They no longer are caught off guard by questions that they couldn't possibly have known the answers to. A prime example is the question a parent often asks; "how is he doing?" It appears to be a very simple question but is difficult to answer if the clinical technician has never seen the patient before. With the patient manager system the technician can confidently answer the question.

The confidence your patients and parents have in your staff will increase

Since the patient is aware that the same technician is a part of their appointments they begin to appreciate the role they play in treatment. They begin to associate progress in treatment with their patient manager. The confidence with which patient managers can answer clinical questions, because they were part of the process, also increases the trust level with patients and parents.

What are the challenges of a patient manager system?

- (1) Part time clinical technicians need special consideration. They will need to be paired together into a team to make a full time equivalent. For example, two part time employees will be paired as one patient manager. Patients will see either one of the technicians throughout treatment. It is the manager's responsibility to make sure their team member stays current with the status of each shared patient.
- (2) High staff turnover in a practice can be an issue. However, a patient manager system can help reduce turn over due to an increased commitment of the team. When a patient manager leaves, existing patients can be divided among the remaining patient managers or be taken on by the new technician.
- (3) All technicians need to be trained and able to perform all clinical tasks necessary

throughout treatment of a case.

- (4) A customized scheduling template is needed for a patient manager system to succeed.
- (5) Scheduling staff must understand the importance of keeping a patient with their manager, and have appropriate scripting to help patients understand the benefit as well.
- (6) If a patient does not feel comfortable with their patient manager they can request to be changed to another. A patient manager may request that a patient be reassigned to another patient manager for various reasons, as well.
- (7) Maintaining an equal number of patients for every manager is key, and requires printing quarterly reports to monitor patient distribution. To correct any inequality, more of the newly starting patients will be directed to the patient manager with a lower patient population.
- (8) The comfort level between the patient and clinical technician is key to providing an exceptional orthodontic experience, but can be hard for the orthodontist to accept initially. The orthodontist may no longer be perceived by the patient as the primary caregiver, or as solely responsible for treatment success.

A customized scheduling template is needed for a patient manager system

In creating your scheduling template, each manager needs to have the correct number and type of appointments to accommodate their patients in a given appointment rotation. For example, in creating a template for 5 patient managers, keep in mind each will have their own chair, column and patient population. It's as if you are scheduling for 5 separate miniature offices.

Create daily templates for each column that have the appropriate type and number of appointments to accommodate the patient manager's patient population. The number of patients in a manager's population will determine the number of appointments that are needed. By tracking the various types of appointments typically performed throughout a patient's treatment, one can estimate how many and what types will be needed to serve the managers population throughout treatment.

Keep in mind that it's necessary to template longer appointments, like bonding, at various times throughout the day and week to accommodate patients' varying schedules.

Now use those daily templates created for one column in the remaining columns. The end result should be that your schedule has the appropriate number of appointments to accommodate the entire patient population.

Implementing a patient manager system requires a series of steps

- (1) Assign every technician their own clinical chair in which they will see their assigned patients. They will become responsible for the chairside inventory, maintenance, and cleaning of the unit. In essence it becomes the "manager's office."
- (2) Each technician will choose a column in the schedule and see the patients in that column. In many offices, the clinical staff is in the habit of taking whichever patient arrives next. The problem with this system is that the technician has no idea if the next patient will be a retainer check, arch wire change, or bonding, making it impossible to prepare before the patient's arrival. Following a column is a nice way to transition into a patient manager system. It allows staff the benefit of knowing what their work day and patient load will look like in advance, and the ability to prepare ahead of time. In situations where an unexpected event causes a technician to run behind in their column, other clinical technicians can step in to help get the column back on time.
- (3) Compose the scripting that will be used to inform patients about the new system and explain its benefits.
- (4) Start assigning new patients to a patient manager at their initial bonding appointment. Treatment coordinators may pre-select the technician assigned for the initial bonding appointment based on the needs of

the patient, or on the skill level of the technician. For example, a newer chairside technician may be scheduled with easier Class I mild crowding cases until their knowledge base increases. Perhaps a patient with special needs may be paired with a technician who is more comfortable working with developmentally disabled patients.

- (5) Take your existing patient population and divide them into three categories; beginning treatment, mid stages of treatment, and nearing the end of treatment. You may want to divide adult patients separately from the adolescent population. From each of these categories, divide the patients equally among the clinical technicians.
- (6) Once assigned, the patient manager's name needs to be recorded in an area of the patient chart that is visible to clinical and front desk staff. This will allow front desk staff to know which patients should be scheduled with each manager.
- (7) After one rotation of patient appointments, re-evaluate the distribution of patients and adjust as needed.
- (8) Create reports that will allow patient managers to track their patient population and monitor their status.
- (9) Establish the protocol used for patient managers to share.

Conclusion

Incorporating a patient manager system into your practice may appear to require tremendous effort; however, once the system is in place the benefits greatly outweigh the effort. Everyone benefits; patients, doctors and staff. Once a patient manager system is implemented maintenance is minimal. Consider the value of this customized personalized approach to patient care that will differentiate your practice, increase efficiency and exceed patient expectations.