The Smile-Vision Multi-Step Case Acceptance Routine

Follow the steps below for predictable case acceptance! Print this document and keep it as a guide for presenting to all new patients coming to your office from advertising.

1. The new-patient phone call:

a) The outcome of the first phone call should result in an office visit to determine the direction of treatment.
b) **Make the first visit short and at low cost** unless the patient wants it otherwise.
c) Emergency patients should be scheduled at a designated "emergency time" (usually at day's end).
d) Never give fees or diagnose problems over the phone.
e) Record patients' address, email and cell number.
f) Send practice info and history documents to patients at home.

2. The free or low cost first visit:

a) A team member meets with new patients in a private area to review their history, ask questions and gather info about the direction of treatment patients expect.
c) Candidates for extensive care should be routed to a complete oral physical.
d) For cases where the smile aesthetics play a roll take a photo and send it to Smile-Vision for a full-face digital smile simulation. Send the simulation to the patient via email and snail mail with an appropriate note.

3. The Complete Oral Physical visit:

a) Patients who are not ready to move forward with other than basic care might refuse the more complete exam. **This is an important screening step**.
b) Use this visit to obtain both clinical and non-clinical info that will help when creating an appropriate written treatment plan.
c) At the C.O.P. visit show and discuss the simulation with patients.
d) Use this opportunity to "frame the fees"

4. Preparation for the consult

a) Schedule a separate appointment for the consult.
b) Request that the patient's spouse or financial proxy be present for that visit.
c) Prepare a **written treatment plan** .
d) Offer 3 treatment options whenever possible.
e) Have fees and visits pre-planned for each option.

5. The consult

a) Have 4 People in the room: Doctor, patient, proxy and financial coordinator.
c) Doctor presents the written plan (not to exceed 20 Min.)
d Verify that the patient understands each option by asking "Is that clear to you?".

e) The doctor leaves the room after all questions are answered and the patient chooses an option.
f) The financial coordinator arranges payment and schedules the next appointment.

6. Post-consult steps for patients who don't move forward at the consult:

a) Setup a Question & Answer Session to resolve any open questions.
b) Send periodic messages to clients via email and snail mail to remind them that you are still there and waiting for a decision.
c) Mention the open treatment options at subsequent routine visits and show the smile simulation.
d) Continue with routine care as usual.

Follow this outline carefully and it will soon become an ingrained routine upon which your office will build!

I invite you to contact me with questions or to discuss the Smile-Vision process in more detail.

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f) The financial coordinator arranges payment and schedules the next appointment.

6. Post-consult steps when patients don't move forward at the consult:

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