

Critiquing your Exam Systems

General Considerations for Critiquing the Exam:

Before you critique the doctor and TC's performances at the exam, you should determine whether the pre-exam procedures are being done, allowing the TC and doctor provide the best exam experience possible. The doctor and/or the Clerical Coordinator should ask the receptionist and TC the following questions, and follow up with any retraining necessary:

Pre-Exam Critique of the Receptionist's Procedures:

Does the receptionist obtain all patient data on the New Pt. Call?☐Yes Note _____

Does the receptionist mail out the Health History immediately?☐Yes Note _____

Do they check on the patient's insurance to see what's available?☐Yes Note _____

Do they check on or calculate the patient's credit rating?☐Yes Note _____

Is a Records Folder being set up before the exam?☐Yes Note _____

Are transfer patients properly processed?☐Yes Note _____

Are incoming records/x-rays properly processed?☐Yes Note _____

Other Notes: _____

Pre-Exam Critique of the TC's Procedures:

Does the TC call the patient a day or two before the exam?☐Yes Note _____

Does the TC talk to the patient and the family on that call?☐Yes Note _____

Are all of the TC's exam forms printed and ready to use at the exam?☐Yes Note _____

Are the TC's props (models, appliances, etc.) available and used?☐Yes Note _____

Is there a telephone in the TC's room to call other dentists?☐Yes Note _____

Is the TC taking the photos (and pre-exam records)?☐Yes Note _____

Is the Exam room clean and tidy with all materials in drawers?☐Yes Note _____

Are the TC, Dr-stool and family seating correct (not clumsy)?☐Yes Note _____

Is the bookkeeper available to do credit checks?☐Yes Note _____

Does the TC have an "insurance reference book" for Pt. insurances?☐Yes Note _____

Does the TC make sure the post-exam Dentist Letter is mailed?☐Yes Note _____

Does the TC have a laptop to make appointments on?☐Yes Note _____

Is the TC following up on Exam Will-Call-Back patients?☐Yes Note _____

Is the TC following up on Missed Exam appointment patients?☐Yes Note _____

Is the TC keeping outcome, follow-up, etc., statistics on exam patients? .☐Yes Note _____

Other Notes: _____

In order to put on a good show exam, the team needs to roll play an exam and critique all the performers from everybody's point of view. To critique the TC and doctor's performances *at* the exam, one team member plays the patient and another team member plays the parent. The rest of the team members critique the doctor's and TC's performances using the questions below.

To evaluate the doctor and TC, just check off OK if pleased with their performance or enter a Note if not pleased. A "rap" is a phrase the doctor or TC uses to transition from one aspect of the exam to another. They are also the chronological order of an effective new patient exam. They are important to do well for a smooth exam, which is why there are numerous questions about the doctor and TC's raps.

The exam critique is based on the exam procedures and forms outlined in the TC's "New Pt. Experience Manual". Basically, the New Pt. Exam is a performance that is either a "good show" that motivates the patient and family to start treatment or it is not! Your job here is to create a succinct, smooth, informative show.

Critique of the TC's performance at the exam as observed by the staff:

- The TC's rap for taking photos/records (if done) is ☐OK
- The TC getting the patient into the room and use of TC Interview Form .. ☐OK
- The TC's rap to bring the patient and family into room and seat them is.. ☐OK
- The TC's rap to seat Pt./family and make comfortable is..... ☐OK
- The TC's rap to explain the exam chronology is ☐OK
- TC's ability to establish a relationship with the Pt/family is ☐OK
- The TC's ability to engage the patient in conversation is..... ☐OK
- The TC's ability to make the patient feel important is ☐OK
- The TC's ability to not "over-talk" the patient/family is ☐OK
- The TC's ability to verify the medical/dental history is ☐OK
- The TC's handling of, "How the patient feels about braces" is ☐OK
- The TC's referral rap for "whom may we thank ..." is ☐OK
- The TC's rap for Family Care Program is ☐OK
- The TC's ability to obtain chief concerns is..... ☐OK
- The TC's rap for parent signing back of interview form is ☐OK
- The TC's ability to avoid "UMS" and "OK's" is ☐OK
- The TC's ability to use *Pre-Closes* (as if the Pt. is already in braces) is... ☐OK
- The TC's ability to avoid *Buy-Backs* (as if Pt. is not already in braces) is. ☐OK
- The TC's ability to listen for, use and allay the Pt's fears is ☐OK
- The TC's rap before getting the DR and "What's next." is ☐OK
- The TC's rap for leaving them with before/after models is..... ☐OK
- The TC's rap about taking records and what they contain is ☐OK
- The Doctor's rap when entering room is ☐OK
- The Doctor's review of the Health History is ☐OK
- The Doctor's use of the TC Interview Form is..... ☐OK
- The Doctor's ability to establish Relationship with the Pt/family is..... ☐OK
- The Doctor's rap for getting the patient into the chair is ☐OK
- The Doctor's rap for "orthodontic lingo and no needles" is ☐OK
- The Doctor does a *Dictated Exam* that is smooth and informative ☐OK
- The TC documents the *Dictated Exam* smoothly and quickly..... ☐OK
- The Doctor's rap for bringing the family to the exam chair is ☐OK
- The Doctor's explanation of the Dx Findings and Tx plan is..... ☐OK
- The Doctor's rap for seating the Pt./family is ☐OK

The Doctor's exit rap for thanking them and leaving is ☐ OK _____

The Doctor's ability to avoid "UM" or "OK" or "Ya-know" is ☐ OK _____

The Doctor's ability to use Pre-Closes is ☐ OK _____

The Doctor's ability to avoid Buy-Backs is ☐ OK _____

The TC completes the Exam Summary form as she explains it to the patient/family

The TC's explanation of the problems found is ☐ OK _____

The TC's explanation of the Tx required is ☐ OK _____

The TC's explanation of what happens next is ☐ OK _____

The TC's explanation of the Records and Tx Fee is ☐ OK _____

The TC's explanation of Financial Arrangements is ☐ OK _____

The TC's rap for obtaining an initial payment now is ☐ OK _____

The TC's ability to "Close the Sale" (get them started) is ☐ OK _____

The TC's scheduling of all starting appointments is ☐ OK _____

Other: _____

The team member who was acting as the PATIENT should critique the doctor's and the TC's performances from the patient's point of view:

The Patient's Critique of the TC's Performance:

The TC is warm and friendly and makes me feel at ease ☐ Yes Note _____

The TC makes me feel important in what she says and does ☐ Yes Note _____

The TC listens for my fears and concerns ☐ Yes Note _____

The TC allows me to say what I want to say ☐ Yes Note _____

The TC speaks slowly enough and is easy to understand ☐ Yes Note _____

The TC uses "raps" that are well done and are easy to understand ☐ Yes Note _____

The TC makes me feel like I am already in treatment ☐ Yes Note _____

The TC excites me about starting treatment ☐ Yes Note _____

The TC provides an exam experience with no "rough edges." ☐ Yes Note _____

The TC does not use "UM" or "OK" very much, if at all ☐ Yes Note _____

Other: _____

The Patient's Critique of the Doctor's Performance:

The Doctor is warm and friendly and makes me feel at ease ☐ Yes Note _____

The Doctor makes me feel important in what he/she says and does ☐ Yes Note _____

The Doctor listens for my fears and concerns ☐ Yes Note _____

The Doctor allows me to say what I want to say ☐ Yes Note _____

The Doctor speaks slowly enough and is easy to understand ☐ Yes Note _____

The Doctor uses "raps" that are well done and are easy to understand ... ☐ Yes Note _____

The Doctor makes me feel like I am already in treatment ☐ Yes Note _____

The Doctor excites me about starting treatment ☐ Yes Note _____

The Doctor does not use "UM" or "OK" very much, if at all ☐ Yes Note _____

Other: _____

The team member who was acting as the PARENT should critique the doctor's and the TC's performances from the parent's point of view:

The Parent's Critique of the TC's Performance:

The TC is warm and friendly and makes me feel at ease ☐ Yes Note _____

The TC focuses on my child instead of me, and I appreciate that ☐ Yes Note _____

The TC makes my child feel important and the center of attention ☐ Yes Note _____

The TC presents herself very well and is very professional ☐ Yes Note _____

The TC allows us to express our concerns and fears about treatment ☐ Yes Note _____

The TC is someone I feel I could ask any question about treatment ☐ Yes Note _____

The TC is easy to understand and I learned much from her ☐ Yes Note _____

The TC makes me feel that treatment is necessary for my child ☐ Yes Note _____

The TC makes me feel that this is the best place to get our treatment ☐ Yes Note _____

Other: _____

The Parent's Critique of the Doctor's Performance:

The Doctor is warm and friendly and makes me feel at ease ☐ Yes Note _____

The Doctor focuses on my child instead of me, and I appreciate that ☐ Yes Note _____

The Doctor makes my child feel important and the center of attention ☐ Yes Note _____

The Doctor allows us to express our concerns and fears about Tx ☐ Yes Note _____

The Doctor is easy to understand and follow in his/her explanations ☐ Yes Note _____

The Doctor makes me feel that treatment is necessary for my child ☐ Yes Note _____

The Doctor makes me feel that he/she can competently handle our Tx ... ☐ Yes Note _____

The Doctor makes me want to start treatment as soon as prudent ☐ Yes Note _____

Other: _____

When done with the *first* exam, discuss the changes to be made to improve the doctor and TC's performances.

Next, the team members who were the patient and parent will now audit another exam with different team members acting as the patient and parent using the same critiques as above. After that exam and critique is completed, discuss the changes to be made to improve the doctor and TC's performances. Do a third exam with a different patient and parent and make the changes to make it perfect.

The TC and doctor should finalize their raps and then use them for exams with real patients and parents. This entire role-playing exercise is difficult and time consuming and probably requires an entire day without patients to perfect.