

The Front Desk: Dream Team or Worst Nightmare?

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The Front Desk Dream Team

- Calm and organized
- Friendly with staff and patients
- Answer phone calls promptly
- Schedule appointments correctly
- Verify insurance eligibility consistently
- Collect co-payments at the time of the visit
- Skilled, efficient and thorough at their jobs
- Strong work ethic
- Accountable
- Reliable



The Front Desk Reality

- Chaos—phones ringing, deluged by patients, charts and paper strewn about
- Overwhelmed and stressed out—too much to do, too many patients, not enough staff or time to do the work
- Too busy to do their jobs thoroughly—cut corners to keep up
- Sometimes the wrong skill sets for the work
- Lack of accountability—no clear expectations or measures of performance

Why Does This Matter?

- The front desk is the public face of your practice; if dysfunction exists here, patients assume dysfunction exists throughout
- Much of the work that supports financial sustainability takes place here
- The front desk is often the first step in the revenue cycle

Case Example: Accounts Receivable Past 90 Days

- \$886,229 Self-Pay
- \$654,663 Medicaid
- \$102,461 Medicaid Managed Care
- \$48,564 Commercial
- **Total = \$1,691,917**

Front Desk Impact

- Failure of the front desk staff to collect patient payments cost this practice \$886,229
- Failure to document patient eligibility for Medicaid and commercial insurance contributed to a nearly \$1 million loss for this practice

Analyze Front Desk Operations

- Involve the front desk staff
- Develop a master list of everything FD staff does
- Solicit staff feedback—what's working, what's not working, suggestions for improvement
- Start at the door of the clinic and do a walk-through as a patient, documenting each step in the current workflow (activity and amount of staff time required). Do this for new patients, existing patients, emergency/walk-in patients
- Create flow charts defining the entire check-in and check-out process for each patient type
- Now you are ready to start thinking outside the box!

Sample Flow Chart, New Patient Check-In

Eligibility is not checked when the appointment is made

Patient calls for appointment; registration schedules appointment

Day of appointment, patient is told to come in 15 minutes early to fill out paperwork.

The completion of paperwork usually takes much longer than 15 minutes because many patients have language or literacy issues

Patients are not required to provide documentation of income

If patient is uninsured, registration clerk asks about income and family size to determine sliding fee scale discount

Once paperwork is complete, patient sits with registration clerk, who enters demographics in computer and verifies eligibility

If there is a backlog of patients to be checked in, the registration clerk checks eligibility later

Encounter form or routing slip is generated

Patient chart is placed in box in treatment area, signifying patient has checked in

Patient sits down in waiting room until called into treatment area

Define the Work

- Pulls and prepares patient charts and prepares daily schedule for dental staff
- Greets patients as they arrive in the dental clinic
- Makes appointments for patients according to the clinic's scheduling policy; confirms appointments; follows up with "DNKAs/no shows" according to the clinic's no-show policy
- Registers patients in clinic computer (verifying and updating name, address, phone numbers, employer, insurance status, etc.); corrects any registration errors
- Checks with insurer (via computer, telephone or POS) to verify that the patient is covered by that insurance, coverage limitations and eligibility for the services to be provided. Checks to determine the patient's co-payment responsibility
- For patients without insurance, collects documentation of income to establish eligibility for sliding fee scale discounts
- Assists patients in completing dental history, consent and financial forms, if necessary
- Checks out the patient; collects co-pays and outstanding balances on patient accounts
- Manages all aspects of the prior approval/authorization process—submits required documentation (via mail and/or computer as appropriate); monitors and tracks status of requests
- Triage walk-in or emergency patients in accordance with the clinic's walk-in/emergency policy and works those who meet emergency criteria into open slots in the daily schedule; schedules future appointments as available for patients whose needs are not urgent or emergent
- Makes reminder calls to patients with upcoming appointments
- Reconciles daily payments and prepares deposits
- Performs photocopying and other clerical duties
- Manages inventory of non-clinical office supplies; orders and restocks as necessary
- Opens and distributes mail
- Other duties as assigned!!!!

Prioritize the Work

Level One Tasks

- Greets patients
- Collects complete and accurate patient demographics; corrects registration errors in system
- Checks with insurer to verify that patient is covered by that insurance, coverage limitations and eligibility for services to be provided
- Identifies where uninsured patients fall on the sliding fee scale
- Determines insured patients' co-payment responsibility
- Collects patient payments (insurance co-pays and self-pay charges)
- Answers phones
- Schedules appointments according to clinic policy

Level Two Tasks

- Triage emergencies and walk-ins
- Pulls and prepares patient charts and prepares daily schedule for dental staff
- Makes reminder calls to patients with upcoming appointments
- Documents and manages DNKAs according to clinic's no-show policy
- For uninsured patients, collects documentation of income to establish eligibility for sliding fee scale discounts
- Assists new patients in completing dental history, consent, privacy and financial forms
- Manages the prior authorization process—submits required documentation, tracks status of requests, schedules patients when approval received

Prioritize the Work (cont.)

Level Three Tasks

- Reconciles daily payments and prepares deposits
- Performs photocopying and other clerical duties
- Manages inventory of non-clinical office supplies; orders and restocks as necessary
- Opens and distributes mail
- Other duties as assigned

Thinking Outside the Box

- In collaboration with the front desk staff, evaluate the three priority levels
- Level One tasks are the ones that have the greatest impact on customer service and financial sustainability
- Level Two tasks are also important, but do they need to be done by the front desk staff?
- Level Three tasks need to be done, but again, is it the best use of front desk staff time?
- Brainstorm how best to use all the possible resources available to get the work done (both within the dental department and within the overall health center)

Sample Strategies

- Consider designating a dental assistant to triage emergencies and walk-ins (they understand dentistry and also know what's going on in the treatment area at any given moment in the day)
- Investigate a service like TeleVox to make reminder calls
- Before scheduling a new patient for a non-emergent visit, consider requiring them to come in ahead of time to fill out all required paperwork, provide proof of insurance status, bring documentation of income for determination of eligibility for the sliding fee scale and review your principles of practice (payment policy, no-show policy, etc.)

Sample Strategies (cont.)

- Consider hiring a high school student or a retiree to come in for a couple of hours in the afternoon to pull charts, file charts, do photocopying, sort the mail, etc.
- Are there any CHC departments that can take over any of the work? (eg, patient accounts, care management)
- Consider creating a front desk coordinator position to oversee front desk operations, carry out the Level Two and Three tasks and fill in where needed (eg, vacations, sick days, crunch times, etc.)

Why People Don't Do Their Jobs Well

Ability (skills, competence, resources)

- They don't have the right skills to do their job
- They don't know how to do how to do their job

Lack of education, training, systems

- They don't know what needs to be done

Lack of clarity, expectations

- They don't have what they need to do their jobs

Lack of tools, resources, time, support

Why People Don't Do Their Jobs Well

Willingness (motivation)

→ They are content to get by with the least effort possible

→ They started out on the right foot but have lost their way

Lack of accountability, performance standards, leadership

Dealing With Ability Issues

- They don't have the right skills to do their job
- They don't know how to do how to do the job
Train, train, train! Formal orientation, job shadowing, periodic reviews and in-services as needed
- They don't know what needs to be done
Complete and accurate job descriptions, checklists, procedures manuals
- They don't have what they need to do their jobs
Determine what they need and, if at all possible, give it to them—the front desk is not the place to be stingy!

Dealing With Willingness Issues

- They are content to get by with the least effort possible
- They started out on the right foot but have lost their way

This is when your leadership skills will be tested!

Fundamental Truths

- Performance matters
- Good performers need to be consistently recognized and rewarded
- Mediocre performers need to be coached, motivated and supported to do better
- Poor performers need to be given the opportunity to step up, and if that doesn't happen, they need to step out

Laying the Groundwork for Accountability

- Take the time to really get to know your front desk staff
- Become an active listener
- Talk with them, not at them
- Foster open and direct two-way communication—empower staff to speak directly with each other and you; be willing to accept their feedback without getting defensive
- The ability of the front desk staff and leadership to confront and deal with issues is crucial to success
- Be crystal clear about performance expectations—they should be in writing (job description, performance evaluation tools, objective success measures, etc.)

Get to Know Your Front Desk Staff

- Find out what they like and dislike about their job
- What do *you* think they are good at? Not so good at?
- What do *they* think they are good at? Not so good at?
- How would they like to be recognized for doing a good job?
- Who are they and where are they coming from? The more you know about them, the better your chances of understanding what drives their behavior

Sample Motivational Chart

Team Member	Likes	Dislikes	Their View	My View	Recognition	Personal
Mary	Dealing with Patients	Paperwork	Strongest: Friendly to patients Weaker: dealing with computer	Strongest: Patients love her Weaker: Easily frustrated by new technology	Likes to be publicly praised	Enjoys movies and books; has an elderly mother in a nursing home
Joy	Working on the computer	Answering phones	Strongest: good at dealing with insurers Weaker: dealing with aggressive patients	Strongest: wonderful attention to detail Weaker: Hates any kind of confrontation	Dislikes being singled out for attention; thank her privately	Single mom with two young children; big extended family and very family oriented

Now What?

- To the extent possible, put staff in jobs that utilize their strengths and minimize their weaknesses
- Try to put them where they will be happiest and do the best job
- Having said that, cross-train all your staff so that everyone knows how to do everyone else's job

Now What?

- Use your enhanced understanding of your staff to develop management strategies for each individual staff person
 - For example, if you have a staff person who struggles to master new technology, understand that whenever new technology is introduced to the practice, this employee will need more time, more one-on-one instruction and more support and encouragement to gain comfort and proficiency
 - If you've got a staff person who absolutely hates confrontation, don't make that person deal with aggressive patients; assign that task to someone who is assertive enough to stick to departmental policies and won't be bullied into bending the rules

Hiring the Right Staff

- First and foremost, hire for ATTITUDE: positive, friendly, team players. Look for signs of energy and a sense of humor. Are they confident and optimistic? What kind of work ethic do they have?
- Next priority: experience in dealing with the public (eg, bank tellers, retail sales people, customer service representatives)
- Nice to have but not essential: prior experience in dentistry (they can learn this as long as you give them formal training and the support they need)
- *Really* nice to have: language skills that mirror your patient population
- BUT, don't fall into the trap of ONLY hiring someone because they are bilingual!

Keeping the Right Staff

- The front desk tends to be a high-turnover area
- Positions are usually among the lowest-paid in the CHC
- We hire people who are bilingual but may lack other key attributes
- We often throw people into these very challenging jobs without giving them the resources, support and leadership they need to be successful
- And then we wonder when they get burned out, frustrated and leave (or, sometimes worse, don't leave but start phoning it in)

What to Do?

- Don't undervalue these positions—these staff are CRUCIAL to the success of your department!
- Look at your hourly rates of pay. Do a salary review of similar jobs in other fields in your region (eg, bank tellers, customer service representatives, retail sales clerks) and set your hourly rate high enough to attract people from these fields (Salary.com is a free and easy research tool)
- Re-engineer your front desk to create an environment that promotes success
- Provide all the training, resources and tools your front desk staff need to be successful in their jobs
- Be the type of leader they would walk through fire for!

Leadership for Accountability

- Be explicit about your expectations for job performance (have EVERYTHING in writing!)
- Don't ignore poor performance; it must be addressed immediately and consistently, or you will lose all credibility and destroy your team's morale
- But don't focus only on poor performance: "catch" your staff when they do something good, and praise, praise, praise!

Leadership for Accountability

- Recognize and reward staff for a job well done (rewards don't have to be monetary; they are tokens of your appreciation, chosen personally by you in recognition of them as individuals)
- Coach in private, recognize publicly (unless you have a staff member who prefers to be recognized privately)
- Lead by example—role model the behaviors and performance you expect from your staff

Front Desk Staff Accountability

- Important objective performance measures
 - Amount of money owed past 90 days by self-pay patients (reflects performance in collecting patient payments at the time of the visit)
 - Number of denied claims due to patient ineligibility (reflects performance in determination of patient eligibility for insurance coverage)
- Work with finance or IT to be able to obtain these reports on a regular basis (eg, monthly)
- Review and share with front desk staff
- Develop short-term action plans for performance issues

Giving Feedback

- Start by telling the employee what's working (*"Mary, I love the way you interact with our patients—you are always so polite and friendly"*)
- Then tell them what's not working—be specific (*"Mary, as you know, everyone is required to be in place and ready to work by 8 a.m. This week alone, you have been late three days."*)
- Remain neutral and objective—don't respond to defensive behavior
- Stay focused on the issue at hand—don't get drawn into responding to the employee's excuses
- State your request (what it is that needs to be improved) (*"Mary, from now on, I need you to be at your desk and ready to work every day by 8 a.m."*)

Giving Feedback (cont.)

- Ask the employee how he or she plans to improve the behavior (*“Mary, what are you going to do to make sure this happens?”*)
- Give the employee a time frame for when you will check back in to see if things have improved (no more than a week or two)
- Close the loop by reviewing the results of the coaching and let the employee know whether his or her performance has improved
- If performance has improved, offer praise and encouragement; continue to monitor and provide positive feedback
- If performance has not improved, consider next steps to move this employee out

“Everyone has peak performance potential—you just need to know where they are coming from and meet them there.”

Ken Blanchard

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