Practice Success

3 WAYS TO STREAMLINE YOUR RECARE WORKFLOW

TIPS FOR A FASTER RECOVERY FROM COVID-19

A PRACTICE SUCCESS PLAYBOOK

3 WAYS TO STREAMLINE YOUR RECARE WORKFLOW

TIPS FOR A FASTER RECOVERY FROM COVID-19

A PRACTICE SUCCESS PLAYBOOK

HENRY SCHEIN ONE

CONTENTS

INTRODUCTION

It's Time for a Better Recare Workflow

Prior to the COVID-19 pandemic, your office probably had a nice, routine recare workflow. You probably did your work without even thinking about the order of the steps.

Then COVID-19 struck and you had to shut down your business. Now you're re-opening and trying to get back to normal, but things aren't routine or normal anymore. Now you have months of delayed prophies and exams on your hands and catching up is hard. And, on top of everything else, now you need to fit in extra COVID-19 safety precautions.

Your pre-COVID recare workflow worked well enough for you. It was comfortable and familiar. But, to paraphrase a line from a famous movie, "You're not in Kansas anymore." Old, familiar ways of doing things won't help you overcome new challenges. To bounce back from COVID-19, you need new and better ways to communicate with patients, get them on the schedule, and prepare them for a faster, contactless check-in when they arrive at your office.

It's time for a better recare workflow.

In this playbook, we'll share three ways you can streamline your recare workflow for a faster recovery from COVID-19.

PATIENT COMMUNICATIONS

When the COVID-19 pandemic forced you to close your doors, you contacted every patient who had an appointment. You may have called them one by one to make sure you reached them. Now you may be calling patients one by one to re-appoint them.

Calling patients one by one is a time-consuming, repetitive process. There's a good chance your front office team is sharing the same information over and over.

There is a better way. With a streamlined digital patient communication workflow, you can reduce the number of phone calls you make and receive, reach more patients in less time, and protect your recare revenue stream.

Send a Welcome Back Email

To establish contact quickly with as many patients as possible, we recommend sending a welcome back email. Experts estimate that email reaches about 85 percent of the people you send it to.[1]

To prepare your email, consider the information you want all your patients to know. Also consider the questions many patients will ask. Then write your welcome back message.

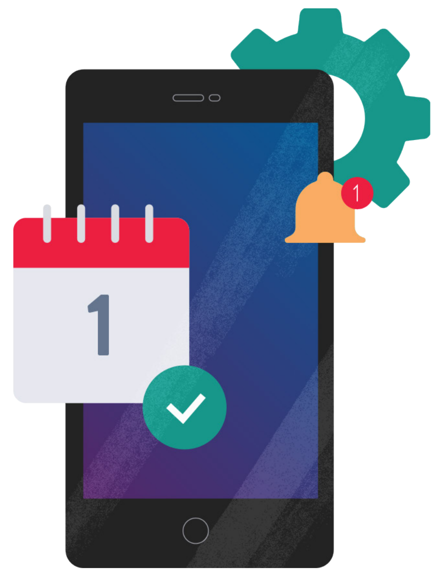
With Patient Engage Campaign Studio, you can send a one-time email to every patient with an email address on file. Every patient your email reaches is one less patient you'll have to call.

Send a Recare Reminder

Many of the appointments you cancelled were recare appointments. To restart your recare engine, send a reminder email to your patients.

Customize your email to suit the circumstances. For example, you could remind patients that COVID-19 prevented them from getting their exam on time and that timely exams help prevent pain and preserve natural teeth. For faster and more convenient service, you should invite patients to book online.

With Patient Engage Personalized Recall, you can send a custom email message to patients who are overdue for recare and you can include a link to book online. Every patient who books online is one less patient you'll have to call.



Get to Know Campaign Studio and Personalized Recall

See what you can do with Patient Engage Campaign Studio. Watch our Campaign Studio Overview video (02:43 minutes).

See what you can do with Patient Engage Personalized Recall. Watch our Personalized Recall Overview video (03:24 minutes).

Patient Engage is included with the Dentrix Optimum Pro and Dentrix Ultimate customer service bundles.

[1] https://optinmonster.com/is-email-marketing-dead-heres-what-the-statistics-show, by Jacinda Santora on August 14, 2020

PATIENT SCHEDULING

During the initial months of the COVID-19 outbreak, you may have treated a few emergency patients, but you probably provided very little routine recare.

Now that you are re-opening your practice, you may discover you have an overwhelming backlog of patients. You may be thinking, “There aren’t enough hours in the day (or the week or the month) to see all these patients!”

Well. . . you’re not wrong. You’re not going to catch up immediately, but there are things you can do to increase your capacity and efficiency.

Extend Your Hours

Opening your office earlier, staying open later, and opening on some weekends may help you see more patients. But working longer hours every day may not be desirable, and it may not be an option for every provider in your practice.

Talk with your team. Explain the need and the opportunity. Some team members may be happy to work irregular shifts. Some may be eager to work extra hours and increase their income.

Offer Online Booking

To streamline your recare scheduling workflow, change the way patients get on the schedule. Instead of making and receiving calls and manually entering appointments, send patients an email, let patients book online, and let Dentrix update your schedule.

With Patient Engage Online Booking, current patients can schedule routine recare appointments even when you’re not answering the phone. And, best of all, you can control the blocks of time and providers available for booking.

Get to Know Online Booking

See how Patient Engage Online Booking works. Watch our Online Booking Overview video (03:58 minutes).

See what your patients will experience when you use Patient Engage Online Booking. Read “Online Booking from the Patient’s Perspective.”

Patient Engage Online Booking is available for Dentrix customers who subscribe to the Dentrix Optimum Pro or Dentrix Ultimate customer service bundle. An add-on fee is required. Call 866.624.4126 to add Online Booking.

PATIENT FORMS

When patients visit your office, one thing is for sure: The experience won't be business as usual. We bet you've implemented a few changes. You may have removed toys and magazines from the waiting room. You may have added a plastic barrier in front of the reception desk. When patients enter the office, you may be requiring temperature checks, hand washing, oral rinses, and masks.

These types of changes help protect patients and staff from COVID-19. Unfortunately, some of them also add time and complexity to every recare visit.

To streamline your recare check-in workflow, we recommend you remove steps that can be completed outside the office before the day of the appointment.

Put Patient Forms Online

Forms are part of every patient visit. Patients move, change jobs, have children, change medications, etc. Your practice needs up-do-date information for every patient.

Here's the rub: Patients don't like filling out forms. Your team doesn't like entering form info on the computer. On busy days, dealing with forms is a time-consuming chore for everyone.

So why not remove forms from the recare check-in workflow? With Patient Engage, you can put patient forms online in a patient portal and patients can update them prior to the appointment. Then, your front office team can import patient information directly into Dentrix.

Remind Patients to Complete Forms

After you post patient forms online in the patient portal, you'll need to remind busy patients to complete them before the appointment.

With Patient Engage, you can send patients an appointment reminder email. In the email, you can include a link to the patient portal where patients can log in and complete the forms.

And, if some patients still need to take care of their forms when they arrive at your office, don't worry. With Patient Engage, you can send them a text message with a link and they can complete the forms on their smartphone.

Get to Know Patient Engage Forms

See how Patient Engage integrates patient forms into a modern, elegant patient journey. Watch our Patient Engage Forms video (01:29 minutes).

Patient Engage is included with the Dentrix Optimum Pro and Dentrix Ultimate customer service bundles.

PUTTING IT ALL TOGETHER: A MORE STREAMLINED WORKFLOW

The COVID-19 pandemic temporarily forced you to suspend your business and restrict many aspects of routine life. Getting your practice back up to speed will take time, but you can bounce back faster by combining the integrated tools in Dentrix and Patient Engage.

When you activate Patient Engage and adopt automated digital patient communications, online booking, and online forms, your streamlined recare visit workflow will look something like this.

1. All patients receive a welcome back email
2. Patients overdue for recare receive a reminder email
3. Patients overdue for recare book an appointment online
4. Dentrix imports appointments into the Appointment Book
5. Patients recieve an appointment reminder email with a link to online forms
6. Patients fill out forms online before arriving at the office
7. The front office team imports patient form info into Dentrix
8. Patients arrive at the office ready for COVID-19 check-in steps

Bounce back faster with innovative solutions from Dentrix. For a demo of the tools in this playbook, visit Dentrix.com/landing/patient-engage or call 833.682.2483.

PREREQUISITES: DO THIS STUFF FIRST

Are you ready to implement a more streamlined recare visit workflow? Not so fast! First, make sure your practice meets these requirements.

REQUIREMENTS	SOURCES OF HELP
Install Dentrix G6.6 (version 16.6) or later	To see which version of Dentrix you are using, in the menu bar of any Dentrix module, click Help, and then click About Dentrix. You'll see the installed Dentrix version number in the About Dentrix dialog box. To update your version of Dentrix, follow our check for updates instructions. Do not install updates without approval from the managers of your dental practice. If you need to sign up for a Dentrix Customer Service Plan in order to update Dentrix, call 1-800-Dentrix, option 1 and speak with an account executive.
Enroll in the Dentrix Optimum Pro or Dentrix Ultimate Customer Service Plan	To find out which Dentrix Customer Service Plan your office is on, call 1-800-Dentrix and speak with a customer service representative. To upgrade your customer service plan to Dentrix Optimum Pro or Dentrix Ultimate, call 1-800-Dentrix, option 1 and speak with an account executive.
Activate and set up patient communications in Patient Engage	To confirm that patient communications have been activated in your Patient Engage account, call 1-800-Dentrix and speak with a customer service representative. To activate patient communications, call 866-739-7695 and register for an onboarding webinar. For review after the webinar, watch our Campaign Studio Overview video (02:43 minutes), watch our Personalized Recare Overview video (03:24 minutes), and read "Communicate with Your Patients Using Email and Text Messages."
Add, activate, and set up online booking in Patient Engage	To confirm that Online Booking has been added to your Patient Engage account and activated, call 1-800-Dentrix and speak with a customer service representative. If you need to add Online Booking to your Patient Engage account, call 1-800-Dentrix, option 1 and speak with an account executive. To activate and set up Online Booking, call 866-739-7695 and register for an onboarding webinar. For a review after the webinar, watch our Online Booking Setup video (05:33 minutes) and read "Setting Up Online Booking Options."
Create patient forms in the Dentrix Questionnaires module	For step-by-step instructions, view our Creating a Questionnaire video (04:10 minutes) or read "Creating Questionnaire Forms" and "Creating Questionnaire Questions."
Upload patient forms to your Patient Engage patient portal	To learn how to upload patient forms to your Patient Engage patient portal, call 866-739-7695 and register for an onboarding webinar. For review after the webinar, watch our Patient Engage Forms video (01:29 minutes) and read "Allow Patients to Fill Out Forms Online."

STEPS FOR WORKFLOW IMPLEMENTATION

If you meet all the requirements in the previous section—in other words, if you have all the back-end stuff set up—it's time to get started! Follow these steps to implement your new, more streamlined recare visit workflow.

1. Extend your practice, provider, and operatory hours in Dentrix. For help, refer to these instructions.
    - Alter Your Practice Hours in Dentrix
    - Change Provider Schedules in Dentrix
    - Change Operatory Hours and Availability in Dentrix

2. Upload your patient forms to the patient portal. For help, refer to these instructions.
    - Allow Patients to Fill Out Forms Online

3. Send a welcome back email to all patients, encourage them to book online for recare, and include a link for online booking. For help, refer to these instructions.
    - Email All of Your Patients with Patient Engage
    - Finalizing Online Bookings (03:40 minutes)
    - Working with Online Bookings in the Appointment Book

4. Send a recare overdue email message to patients in your recare program and include a link for online booking. For help, refer to these instructions.
    - Send Recare Due Reminders with Patient Engage

5. Send a reminder email to patients who have a scheduled recare appointment. Remind them to fill out your forms online and include a link to their patient portal. For help, refer to these instructions.
    - Texting Instructions to Tomorrow's Patients
    - Allow Patients to Fill Out Forms Online

6. If patients arrive at the office and still need to fill out forms, send them a text message with a link to their patient portal and invite them to complete the forms on their smartphone. For help, refer to these instructions.
    - Sending Patients a Check-In Link with Patient Engage

Dentrix.com

Bounce back faster with innovative solutions from Dentrix.

For a demo of the tools in this playbook, visit
Dentrix.com/landing/patient-engage
or call 833.682.2483.