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A NOTE FROM THE AUTHOR

WELCOME TO ASPIRE2D'S FREE RESOURCES

Congratulations on pursuing new skills and knowledge with Aspire To Dental!

My name is Renata Emilianowicz and I am a qualified dental practice manager with 30 years of hands-on clinical, front desk and admin experience in private dental practices in Melbourne, Australia.

In 2012 I founded Fledgling Dental Services, practice management consulting, and began sharing my management knowledge and front desk expertise with dentists and their teams, improving their practices and enhancing their skills. In 2020, Fledgling made the pivot to Aspire2d to meet the needs of the dental team; namely the assistants, front desk and managers who want to learn and develop professionally through continuing education.

My courses aim to provide you with the knowledge, skills and tools to become confident, proactive, effective and skillful. Dental life can be challenging and the more knowledge and skills you take up, the more successful, valuable and sought-after you become!

I hope you enjoy this free resource and that it brings you closer to your own goals. Remember as you move forward, that you are investing in yourself and that is awesome!

Well done to you!

Renata Emilianowicz
Renata Emilianowicz
Founder of Aspire2d.com.au

PATIENT EXIT PROTOCOL

PATIENT EXITING THE PRACTICE – POLICY AND PROCEDURES

When a patient decides to leave the practice, they are entitled to request a **copy** of their records to be sent to their new dentist or request a copy for themselves. This request **must** be complied with, and although the practice has X weeks to do so, it is a good will gesture to do so **as quickly as possible**.

The request must be **in writing** and the patient must sign it.

GUIDELINES FOR PATIENT EXIT

1. Perform an Exit Interview per protocol
2. Document conversations and requests in patient file and on exit log sheets
3. Advise dentist of situation and patient feedback, if any
4. Comply with request for records as soon as possible
5. Follow up on feedback, if appropriate
6. Delete patient recall, remove from marketing lists
7. Deactivate file

PATIENT EXIT INTERVIEW CONVERSATION GUIDE

The exit interview is used to identify **why** the patient is leaving the practice and is another **opportunity** to attempt to **save** the relationship (if desired) and to gain **feedback** to use to **improve** the practice.

It does not need to be a daunting experience and keeping it **sincere and polite** will encourage the patient to offer up information.

"Hello Mr Smith, this is your name from your practice name. I am calling to let you know we received your request for a copy of your records to be sent to Dr X and we will have those sent over in the next few days.

If you have a moment, whenever a patient leaves the practice, we do like to ask if there is a specific reason why or if there is any feedback you would like to give our practice? <allow patient to speak uninterrupted, follow patient feedback guidelines>

We do thank you for your honesty and we use the feedback to improve our services to all patients.

<add if appropriate> Please keep in mind, if you would ever like to return to us, our door is always open".

PATIENT EXIT INTERVIEW & DEACTIVATION

Patient name:

Date:

Date pt last visit:

Provider/s:

Years at practice:

Reason for leaving:

Feedback for improvement:

Disputes settled/patient satisfied with outcomes:

Interview conducted by:

Call date and time:

- | | |
|--|--|
| <input type="checkbox"/> Consent form received and scanned to file (initialled:) | <input type="checkbox"/> Patient removed from mailing lists (initialled:) |
| <input type="checkbox"/> Provider informed of exit and feedback given (initialled:) | <input type="checkbox"/> Future appts cancelled (initialled:) |
| <input type="checkbox"/> Records and radiographs copied and sited by provider (initialled:) | <input type="checkbox"/> File deactivated (initialled:) |
| <input type="checkbox"/> Recall/s deleted (initialled:) | <input type="checkbox"/> Records sent/emailed to new practice (initialled:) |

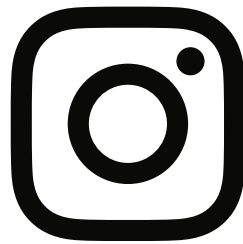


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Renata Emilianowicz