

Total Team Evaluation

In-office evaluations are a great way to understand the strengths of a dental practice and find ways to improve. In this evaluation, you will be asked to evaluate your own work as well as the work of your colleagues. Below is a series of questions for staff members regarding the following areas: treatment, financing, operations, patient relations, hygiene and scheduling. Please answer each question.

always sometimes rarely never unsure

Treatment					
1. Does the dentist diagnose every patient comprehensively?					
2. When the dentist discusses treatment recommendations with the patients, does he/she create a desire for treatment?					
3. Does the dentist complete the procedures quickly and comfortably?					
4. Does the dentist try to understand the patients and their possible fears of dentistry?					
5. Does the dental assistant anticipate the requirements of the procedure and stay ahead of the dentist while he/she treats the patient? (For example, having all instruments, supplies and equipment ready chair-side before the procedure begins)					
6. Does the dental assistant work to develop a synergistic and seamless working relationship with the dentist? (For example, do the dental assistant and dentist have common goals, such as making sure the patient is as comfortable as possible and is receiving the most comprehensive treatment possible?)					
7. Does the dental assistant coordinate as much of the lab work as possible? (For example: monitor cases leaving and returning)					
8. Does the dental assistant make the patient's visit more comfortable and less frightening? (For example, does the dental assistant offer reassuring words; touch the shoulder or arm of patients to let them know they're not alone; offer encouraging and reassuring words to patients like "You're doing great!" or "You're almost done" and let patients know when to breathe or swallow, etc.)					
9. Does the dental assistant pay close attention to the physical state of the patient during the procedure and then do something about it? (For example, noticing signs of anxiety—rapid breathing, chair clenching, dry mouth, trembling, elevated blood pressure and heart rate, unresponsiveness to questions, and wide fearful eyes—and then asking patient if he/she is okay)					
10. Does the dental assistant direct the dentist throughout the day? Specifically, does the dental assistant plan the traffic flow for the day and direct the dentist from treatment room to treatment room and hygiene exam to hygiene exam?					
11. Does the dental assistant make sure he/she attends required CE courses for the year to maintain the license required by the state?					
12. Does the dental assistant ask the dentist for coaching and feedback so he/she can improve skills?					
13. Does the dental assistant properly manage the ordering of clinical supplies? Specifically, does he/she know the office budget and watch the supply inventory so supplies can be ordered before they run out?					
Financing					
14. Does the financial coordinator counsel with the patients and help them find a way to pay for treatment?					
15. Does the financial coordinator regularly research lending institutions to discover financing options available to patients?					
16. Does the financial coordinator spend the time asking the "right" questions to patients about financing and really listen to their answers? (For example, does he/she say, "Help me understand what fits in your budget?")					
17. Are those patients who did not secure financial arrangements during their visit contacted and followed up with?					
Subtotal:					

Evaluation sponsored by:



Total Team Evaluation *(continued)*

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Operations					
18. Are insurance claims processed daily? Do they include appropriate attachments? (For example, X-rays, photographs and narratives)					
19. Are insurance claims and payments monitored to make sure they correspond?					
20. Does the office set and regularly achieve a goal to have a specific number of new patients per month? (Twenty-five new patients per month is recommended)					
21. Does the dentist have a constant awareness of the accounts payable and receivable?					
22. Does the dentist seem cognizant of the costs associated with running the practice?					
Patient Relations <i>Note: This section contains questions about tasks fulfilled by multiple staff members.</i>					
23. Do I answer the telephone calls by the third ring at the latest?					
24. Do I smile before answering the phone and during the call?					
25. Do I show genuine concern and empathy for each patient's situation?					
26. Am I positive and enthusiastic about the dental practice? (For example, do I make sure the patients know that they have called the right office to schedule an appointment?)					
27. When I answer the phone, do I identify the office name and my personal name? (For example, "Good morning, this is XYZ Dentistry, Tawana speaking.")					
28. Do I say such phrases as, "How may I help you" (which shows an attitude of helpfulness to the patient)?					
Hygiene					
29. Does the hygienist oversee the periodontal health of the patients by educating them on the benefits of periodontal care?					
30. Does the hygienist talk to the patient about the things he/she specifically notices during the cleaning, so the patient is able to talk to the dentist about those issues during the exam?					
31. Does the dental hygienist act as a scout for the dentist? In other words, does he/she review charts daily to find potential dentistry waiting to be done?					
32. Is the dental hygienist a technical expert? Specifically, does he/she stay current on the latest technology and treatment of periodontal disease?					
33. Does the dental hygienist attend continuing education classes?					
34. Does the dental hygienist monitor the success of the treatment that he/she has recommended for the patients?					
Scheduling					
35. Does the office staff schedule patients in a productive way, so the office can meet daily goals? (For example, does the office staff direct patients to schedule during the time available for their particular procedure)					
36. Does the office staff create an "ideal day" in the schedule that allows the office to meet that goal? (Note: An ideal day uses block scheduling because dentists can't be in two places at the same time. Each block represents a certain dollar amount, thus meeting the production goal. For detailed information, see my scheduling webinar at www.ArrowheadDental.com/scheduling-for-production)					
37. Does the office staff monitor the schedule throughout the day to ensure it is flowing smoothly and fill "holes" (cancellations), if there are any?					
38. Does the office staff engage in recall activities on a daily basis?					
TOTAL: Always: _____ Sometimes: _____ Rarely: _____ Never: _____ Unsure: _____ Subtotal:					