

TIPS FOR THE NEW PATIENT COORDINATOR

Learn from your doctor; always be present while the doctor is reviewing diagnosis and treatment goals with the patient/parent. Listen to the specific words and phrases being used.

Ask if you don't know; not all New Patient Coordinator's have dental or orthodontic background prior to being hired. You have to ask questions. Just make sure you ask your question once the patient/parent is not present or you could start a list. When you get a chance to meet with the doctor, ask them all at once. Never try bluffing your way through if you do not have the answer, when you are caught you will lose credibility with the patient/parent.

Spend time with the clinical team in the operatory; take the time to learn and understand how each procedure is performed, how the clinical team interacts with the patient, and how appliances actually look in the mouth and function. The more you know about how orthodontics is performed in the office the better you will be able to educate the patient and schedule the procedures needed to start treatment.

Set-up your Exam/Consult Room; ideally the room you use for Exams/Consult should have a computer, printer, sink, storage cabinets for filing and materials needed during the exam. Arrange your materials so that once you are seated you don't have to get up and down for items that may be needed while working with your patient/parent (typodonts, paperwork and forms, telephone).

Look the part; you represent your doctor, the practice and the profession of orthodontics. First impressions are lasting and **you will be "checked out" during the exam by both patient/parent, it is human nature. Be conservative with your dress and look. Too much makeup, wild hair, jewelry, short skirts, shirts that may show cleavage when bending will distract from you presenting as an "authority in orthodontics".**

Develop a checklist; there are many steps and procedures that must be completed, documented, and reviewed to get a patient started in treatment. Put together a workflow list of the task you must complete with "check off boxes". Attach the list to your patient's chart for a quick visual reference. Have an area to sign off on the flow list once all tasks have been completed.

Learn to be flexible; when dealing with doctors, patients/parents, schedules and life in general you as the New Patient Coordinator need to be prepared and ready to *switch gears* at the "drop of a hat". You may have been taught "step by step" how to do the initial exam, but you must be able to adapt to the situation at hand. It is acceptable to change your

sequence based on the patient arriving late or the doctor being held up in the operatory. The bottom line should be the patient/parent understanding the need for orthodontics, and how your doctor and team will make it happen. If you show signs of stress because *things are just not happening the way they should*, the patient/parent will notice it. Keep your cool and improvise.