

Minimal Standards for Orthodontic Consultants

...You should get what you pay for!

Lets face it, every consultant has some value to a practice; otherwise the practice wouldn't be seeking help. Consultants are outsiders who can look at your practice and use their expertise to find what's *not* working. This is especially helpful in younger growing practices, although it can also be helpful in more mature practices. But, consultants truly worth their fee are those who can look at a practice and see what it can aspire to: a smoothly operating, minimally stressful, harmonious, efficient and productive practice that provides exceptional treatment and services beyond what the patient expects

Most consultants are competent and helpful, but some should be avoided, especially those making outrageous claims about the effects of their services, for example, unrealistic growth. Some consultants specialize in just one service (office design, scheduling, TC Program, etc.), while others provide a few services and a few provide all services. Whether they provide one service or all, they must still exceed minimal standards to be worth their fee—not unlike orthodontic fees and services.

It is the prerogative of the orthodontist to hire one or more consultants over time, but if these consultants' areas of expertise overlap and their philosophies differ, there will be problems that affect the value of their services. With this in mind, a consultant's services should attain a goal and meet minimal standards to attain that goal. There are **9** areas of systems that every practice has in one form or another. Without them, the practice cannot operate—it is the consultant's job to make those systems as and effective as possible. There is also a 10th consultant area that is not an operational system—office design.

1) Team Organization Standards:

To create an efficient and effective organizational structure with all staff equally used. This is accomplished through:

- An effective organizational structure for the practice's *present* production and for growth
- Initial evaluation of each team member's ability to function well in a position
- Ongoing evaluation of each team member's effectiveness in a position

2) Team Hiring Standards:

To create an effective system that hires the right person for a position she is naturally inclined to do well in. This is accomplished through:

- Effective hiring program to screen out new team members
- Effective salary and benefits program for new team members
- Design of an Office Policies/Benefits Manual
- A system for retiring and replacing ineffective team members

3) Team Training Standards:

To create a system to efficiently and effectively trains staff in all team members in all positions in the shortest time possible. This is accomplished through:

- Ongoing evaluations of each team member's effectiveness and retraining in weak areas
- A new employee legal & orthodontic orientation
- A detailed training program for each position
- OSHA Compliance Standards:

To create systems that comply with OSHA standards so that team members and patients are protected and so that the practice is protected from OSHA fines, etc.

- Creation of the Three Written Plans, Hazards Training, Team Member Hazard Classification, SDS documents & Labeling, etc.,
- Initial Medical Record keeping, vaccinations, and initial and periodic team member training, etc.
- Creation of Hazardous Materials, Hazardous Waste and other OSHA control systems
- Ongoing daily, weekly and monthly checklist monitoring systems
- HIPAA Compliance Standards

To create systems that comply with HIPAA standards to protect patient data. This is accomplished through:

 - Providing the patient with a handout of the practice's "Notice of Privacy Policies"
 - Obtaining a "Acknowledgement of Receipt" from patient that they received the practice's "Notice of Privacy Policies"
 - Obtaining the patients' approval for displaying their pictures on walls, computers, etc.
 - Obtaining the patient's approval for using their records for case studies, etc.
 - Team training to avoid divulging patient ID or treatment information to others in oral or written form

4) TC Programs Standards:

To create a TC program that will attract and start the maximum number of new patients from all referral sources. This is accomplished through:

- Having a TC that is naturally inclined to do well in this
- Having a comprehensive exam that makes the patient feel important and wanted
- Having the necessary aids and forms to effectively educate the patient/family
- If possible, having a TC know how to effectively sell, to get the patient started ASAP
- Marketing System Standards:

To create a marketing plan that includes the most cost effective and simplest to use marketing systems, which attract the maximum number of new patient starts. This is accomplished through:

- A yearly marketing plan that specifies who does what and when, according to what budget
- Marketing through exceptional service
- Effective forms and letters to communicate with patients, family, dentists and all referrers
- Marketing of referring dentists and their teams, schools and local organizations
- Marketing through "gimmicks" that attract the patient's attention and referrals

5) Team Scheduling Standards:

To create a scheduling system that includes all of the appointments required to treat patients, according to the doctor's treatment philosophy. This is accomplished through:

- The collection of statistical data and analysis of the doctor's Tx Mechanotherapy
- Working with all team members for maximum input to make it *their* system
- Scheduling calculations and design of a system that maximizes growth and team utilization
- Designing a schedule that accounts for the staff and doctor's treatment times.
- Making sure that the numbers of appointments will fit the practices daily needs
- Creating new computer TEMPLATES and appointment CODE SHEETS
- On-site installation of the scheduling system with all team members
- Ongoing critiquing and improving on use of scheduling system
- Teaching the team how to stay on schedule daily

6) Treatment Quality Control Standards:

To establish systems for monitoring patient treatment to assure that it is completed on a time. This is accomplished through:

- Effective records, imaging and diagnostic systems, treatment planning systems, etc.
- An effective Treatment Charting system
- An effective Patient education (cooperation) program
- A system of patient cooperation letters and conferences to maximize patient cooperation
- A Periodic Patient Treatment Review system of all patients
- Effective starting, ongoing and end of treatment DDS forms and letters

7) Goal-Attaining & Reporting Standards:

To establish systems that help the practice set and attain realistic monthly goals. This is accomplished through:

- Setting realistic monthly goals based on past history and future programs
- Gathering important, accurate monthly Financial, Visit and TC Statistics
- Reporting on those statistics to monitor monthly Goal-Attainment
- Implementing systems to attain unmet goals (e.g., marketing programs for more exams)
- Setting up and monitoring a yearly budget that is monitored monthly if desired

8) Practice Transition (New Partner/Retirement) Program Standards:

To help the practice determine the best partner/buyer configuration and the most advantageous manner of their practice transition. This is accomplished through:

- Determine the most effective transition timing (months, years)
- If not a practice sale, determine the type of partnership, and evaluation of the new partner
- Calculation of the sale or buy-in price, purchase plan and legal/accounting considerations
- Creation of harmonious relationships between the new partner and team during the transition

9) Financial Control Systems Standards (mostly done through the Computer system):

Accounts Receivables System Standards:

To establish systems that assure that all treatments are properly charged, have realistic financial agreements, and have payments collected with minimal past due accounts. This is accomplished through:

- Calculating fee schedules and Financial Agreements, and controlling miscellaneous charges
- Daily Cash Control systems to make sure that what comes in the door gets in the bank
- C** An accounts receivable system that accounts for all charges, payments, and adjustments
- C** Past Due Accounts systems to limit and process past due accounts
- C** An insurance control system that collects all payments

Purchasing & Inventory Control System Standards

To have the practice identify the types, levels and lowest cost of all supplies required to provide patient care, so that there is neither an excess nor shortage. This is accomplished through:

- A system for determining levels of all supplies required
- A specific team member in charge of the system
- Organized supplies storage for easy inventory control
- Obtaining the best prices (meeting sales, clubs, specials, etc.)

Accounts Payable Control System Standards:

To establish systems that make sure that all vendors are accurately paid on time, thus avoiding late penalties while taking advantage of early payment discounts. This is accomplished through:

- A system that verifies all invoices and statements received
- A payables system to write and account for vendor checks

- A system that traces all payment categories for budget control

Payroll Control System Standards:

To have the consultant establish systems that assures that staff are accurately paid on time. This is accomplished through:

- A system to accurately account for hours worked
- Accurate calculation of team member salaries, benefits, bonuses and
- A system of office policies that defines all aspects of benefits and bonuses
- A payroll system available to produce payroll checks and pay the various governments, etc.

10) Office Layout Design Standards:

Although, not actually part of your office systems, this area of consulting is important. Its goal is to design an efficient, effective, and pleasing office layout that allows for maximum patient treatment in a comfortable yet minimal amount of space. This is accomplished through:

- A functionally efficient floor plan, with a smooth flow between all of the team member's interrelated work areas
- An evaluation of the adequacy of existing equipment and furniture and replacement as required
- An attractive decor and use of the existing or expanded space

To apply the above 10 sets of standards, the practice simply:

- Obtains a chronological, dated list of the consultant's previous clients to call and verify that consultant's exact qualifications.
- Obtains a written plan from the consultant for all services to be provided and a stated fee for those services; breaking the fee down by service if needed
- Makes sure that the service meets the minimal requirements above to obtain the goal of that service.
- Makes sure the service involves the entire team when designing and installing the systems—the team must view all system changes as *their* systems.

A consultant is the sum of his or her experiences, applying to your practice what seems to have worked in numerous practices in the past...but there are no guarantees. With this in mind, use the above standards for hiring the best consultants for your practice for the services you desire.