

Critiquing your Exam Systems

General Considerations for Critiquing the Exam:

Before you critique the doctor and TC's performances at the exam, you should determine whether the pre-exam procedures are being done, allowing the TC and doctor provide the best exam experience possible. The doctor and/or the Clerical Coordinator should ask the receptionist and TC the following questions, and follow up with any retraining necessary:

Pre-Exam Critique of the Receptionist's Procedures:

- Does the receptionist obtain all patient data on the New Pt. Call?Yes Note _____
 - Does the receptionist mail out the Health History immediately?Yes Note _____
 - Do they check on the patient's insurance to see what's available?Yes Note _____
 - Do they check on or calculate the patient's credit rating?.....Yes Note _____
 - Is a Records Folder being set up before the exam?Yes Note _____
 - Are transfer patients properly processed?Yes Note _____
 - Are incoming records/x-rays properly processed?.....Yes Note _____
- Other Notes: _____
- _____

Pre-Exam Critique of the TC's Procedures:

- Does the TC call the patient a day or two before the exam?Yes Note _____
 - Does the TC talk to the patient and the family on that call?.....Yes Note _____
 - Are all of the TC's exam forms printed and ready to use at the exam?Yes Note _____
 - Are the TC's props (models, appliances, etc.) available and used?Yes Note _____
 - Is there a telephone in the TC's room to call other dentists?.....Yes Note _____
 - Is the TC taking the photos (and pre-exam records)?.....Yes Note _____
 - Is the Exam room clean and tidy with all materials in drawers?.....Yes Note _____
 - Are the TC, Dr-stool and family seating correct (not clumsy)?.....Yes Note _____
 - Is the bookkeeper available to do credit checks?Yes Note _____
 - Does the TC have an "insurance reference book" for Pt. insurances?Yes Note _____
 - Does the TC make sure the post-exam Dentist Letter is mailed?.....Yes Note _____
 - Does the TC have a laptop to make appointments on?Yes Note _____
 - Is the TC following up on Exam Will-Call-Back patients?Yes Note _____
 - Is the TC following up on Missed Exam appointment patients?.....Yes Note _____
 - Is the TC keeping outcome, follow-up, etc., statistics on exam patients?..Yes Note _____
- Other Notes: _____
- _____
- _____
- _____
- _____

In order to put on a good show exam, the team needs to roll play an exam and critique all the performers from everybody's point of view. To critique the TC and doctor's performances *at* the exam, one team member plays the patient and another team member plays the parent. The rest of the team members critique the doctor's and TC's performances using the questions below.

To evaluate the doctor and TC, just check off OK if pleased with their performance or enter a Note if not pleased. A "rap" is a phrase the doctor or TC uses to transition from one aspect of the exam to another. They are also the chronological order of an effective new patient exam. They are important to do well for a smooth exam, which is why there are numerous questions about the doctor and TC's raps.

The exam critique is based on the exam procedures and forms outlined in the TC's "New Pt. Experience Manual". Basically, the New Pt. Exam is a performance that is either a "good show" that motivates the patient and family to start treatment or it is not! Your job here is to create a succinct, smooth, informative show.

Critique of the TC's performance at the exam as observed by the staff:

- The TC's rap for taking photos/records (if done) is..... OK _____
- The TC getting the patient into the room and use of TC Interview Form .. OK _____
- The TC's rap to bring the patient and family into room and seat them is.. OK _____
- The TC's rap to seat Pt./family and make comfortable is..... OK _____
- The TC's rap to explain the exam chronology is OK _____
- TC's ability to establish a relationship with the Pt/family is OK _____
- The TC's ability to engage the patient in conversation is..... OK _____
- The TC's ability to make the patient feel important is OK _____
- The TC's ability to not "over-talk" the patient/family is OK _____
- The TC's ability to verify the medical/dental history is OK _____
- The TC's handling of, "How the patient feels about braces" is OK _____
- The TC's referral rap for "whom may we thank ..." is..... OK _____
- The TC's rap for Family Care Program is OK _____
- The TC's ability to obtain chief concerns is..... OK _____
- The TC's rap for parent signing back of interview form is OK _____
- The TC's ability to avoid "UMS" and "OK's" is OK _____
- The TC's ability to use *Pre-Closes* (as if the Pt. is already in braces) is... OK _____
- The TC's ability to avoid *Buy-Backs* (as if Pt. is not already in braces) is. OK _____
- The TC's ability to listen for, use and allay the Pt's fears is OK _____
- The TC's rap before getting the DR and "What's next." is OK _____
- The TC's rap for leaving them with before/after models is..... OK _____
- The TC's rap about taking records and what they contain is OK _____
- The Doctor's rap when entering room is OK _____
- The Doctor's review of the Health History is OK _____
- The Doctor's use of the TC Interview Form is..... OK _____
- The Doctor's ability to establish Relationship with the Pt/family is..... OK _____
- The Doctor's rap for getting the patient into the chair is OK _____
- The Doctor's rap for "orthodontic lingo and no needles" is OK _____
- The Doctor does a *Dictated Exam* that is smooth and informative OK _____
- The TC documents the *Dictated Exam* smoothly and quickly..... OK _____
- The Doctor's rap for bringing the family to the exam chair is..... OK _____
- The Doctor's explanation of the Dx Findings and Tx plan is..... OK _____
- The Doctor's rap for seating the Pt./family is OK _____

- The Doctor's exit rap for thanking them and leaving is OK _____
- The Doctor's ability to avoid "UM" or "OK" or "Ya-know" is OK _____
- The Doctor's ability to use Pre-Closes is OK _____
- The Doctor's ability to avoid Buy-Backs is OK _____
- The TC completes the Exam Summary form as she explains it to the patient/family
- The TC's explanation of the problems found is OK _____
- The TC's explanation of the Tx required is OK _____
- The TC's explanation of what happens next is OK _____
- The TC's explanation of the Records and Tx Fee is OK _____
- The TC's explanation of Financial Arrangements is OK _____
- The TC's rap for obtaining an initial payment now is OK _____
- The TC's ability to "Close the Sale" (get them started) is OK _____
- The TC's scheduling of all starting appointments is OK _____
- Other: _____

The team member who was acting as the PATIENT should critique the doctor's and the TC's performances from the patient's point of view:

The Patient's Critique of the TC's Performance:

- The TC is warm and friendly and makes me feel at ease Yes Note _____
- The TC makes me feel important in what she says and does Yes Note _____
- The TC listens for my fears and concerns Yes Note _____
- The TC allows me to say what I want to say Yes Note _____
- The TC speaks slowly enough and is easy to understand Yes Note _____
- The TC uses "raps" that are well done and are easy to understand Yes Note _____
- The TC makes me feel like I am already in treatment Yes Note _____
- The TC excites me about starting treatment Yes Note _____
- The TC provides an exam experience with no "rough edges." Yes Note _____
- The TC does not use "UM" or "OK" very much, if at all Yes Note _____
- Other: _____

The Patient's Critique of the Doctor's Performance:

- The Doctor is warm and friendly and makes me feel at ease Yes Note _____
- The Doctor makes me feel important in what he/she says and does Yes Note _____
- The Doctor listens for my fears and concerns Yes Note _____
- The Doctor allows me to say what I want to say Yes Note _____
- The Doctor speaks slowly enough and is easy to understand Yes Note _____
- The Doctor uses "raps" that are well done and are easy to understand ... Yes Note _____
- The Doctor makes me feel like I am already in treatment Yes Note _____
- The Doctor excites me about starting treatment Yes Note _____
- The Doctor does not use "UM" or "OK" very much, if at all Yes Note _____
- Other: _____

The team member who was acting as the PARENT should critique the doctor's and the TC's performances from the parent's point of view:

The Parent's Critique of the TC's Performance:

- The TC is warm and friendly and makes me feel at easeYes Note _____
 - The TC focuses on my child instead of me, and I appreciate thatYes Note _____
 - The TC makes my child feel important and the center of attention.....Yes Note _____
 - The TC presents herself very well and is very professional.....Yes Note _____
 - The TC allows us to express our concerns and fears about treatment.....Yes Note _____
 - The TC is someone I feel I could ask any question about treatmentYes Note _____
 - The TC is easy to understand and I learned much from her.....Yes Note _____
 - The TC makes me feel that treatment is necessary for my childYes Note _____
 - The TC makes me feel that this is the best place to get our treatment.....Yes Note _____
- Other: _____

The Parent's Critique of the Doctor's Performance:

- The Doctor is warm and friendly and makes me feel at easeYes Note _____
 - The Doctor focuses on my child instead of me, and I appreciate thatYes Note _____
 - The Doctor makes my child feel important and the center of attentionYes Note _____
 - The Doctor allows us to express our concerns and fears about TxYes Note _____
 - The Doctor is easy to understand and follow in his/her explanationsYes Note _____
 - The Doctor makes me feel that treatment is necessary for my childYes Note _____
 - The Doctor makes me feel that he/she can competently handle our Tx...Yes Note _____
 - The Doctor makes me want to start treatment as soon as prudentYes Note _____
- Other: _____

When done with the *first* exam, discuss the changes to be made to improve the doctor and TC's performances.

Next, the team members who were the patient and parent will now audit another exam with different team members acting as the patient and parent using the same critiques as above. After that exam and critique is completed, discuss the changes to be made to improve the doctor and TC's performances. Do a third exam with a different patient and parent and make the changes to make it perfect.

The TC and doctor should finalize their raps and then use them for exams with real patients and parents. This entire role-playing exercise is difficult and time consuming and probably requires an entire day without patients to perfect.