

## MANAGEMENT & MARKETING The Patient Manager System

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For several years I have been hearing about a relatively new concept in orthodontic patient care. The basic idea is that the office assigns a specific staff member to work with each patient, as chairside assistant and communicator, throughout treatment. In our September 1997 column, Drs. Hickory and Selnick and Ms. Jefferson described what they call their "Care Coordinator Program". In this month's article, Dr. Robert Fry discusses a similar concept, the "Patient Manager System".

One of the most important benefits he lists is the reduction in conflict between the operatory staff and front-desk staff. In the Patient Manager System, the chairside assistants schedule their own appointments, and this potential conflict is avoided.

Dr. Fry emphasizes the improved communication between patients and staff. In effect, he has created several small practices within the larger whole, thereby permitting more individual attention. This kind of communication is a natural marketing tool, and Dr. Fry assures me he now has a larger practice with fewer staff members.

I can see several drawbacks to the system. It could become sticky if the patient and the assigned Patient Manager do not get along. The obvious solution would be to assign the patient to a different staff member, but Dr. Fry says this rarely happens. Problems could also arise when Patient Managers have unexpected absences or leave the practice. If these do not cause chaos in the author's practice, it must be because he has a good, cross-trained staff. Finally, it should be mentioned that although many tasks can and should be delegated (depending on your state laws), the orthodontist bears the ultimate responsibility for each patient's treatment.

### The Patient Manager System

The Patient Manager System was conceived by Dr. Bob Bray of Atlantic City, NJ. We began using it in August 1994, and we have found it easy to implement and effective in improving the quality of service to our patients.

The concept is quite simple: each patient is assigned to his or her own staff member. The Patient Manager follows the patient from the initial appliance placement to the last retainer check.

### Advantages for the Staff

- *1. Pride of ownership.* If you own your home or your car, you are much more likely to be concerned about its care. When Patient Managers sense ownership of their patients, they are much more likely to take a personal interest in treatment results and patient care (Fig. 1).
- *2. Development of personal relationships.* A close relationship can develop when the same staff member sees a patient at every visit (Fig. 2). These friendships often last beyond the treatment period. Our Patient Managers receive gifts from many of their patients as tokens of appreciation for their outstanding service.
- *3. Autonomy.* Most people work best through self-motivation. Autonomy encourages staff members to see the whole picture, which makes the office run more smoothly and efficiently.
- *4. Flexibility.* Patient Managers can schedule their own hours. If they need to leave in the middle of the day for appointments or to support their children at concerts or sporting events, they can do so as

long as they provide service to their patient families. Obviously, their hours must coincide with the scheduled office hours.

- *5. Accountability.* Traditional chairside assistants often feel they are pulling more of the load than other assistants are. In the Patient Manager System, staff members who don't pull their own weight are naturally forced out by peer pressure.
- *6. Reduced conflict.* The receptionist is no longer stressed by having to schedule return visits while answering the phone and greeting new patients. We have found it more efficient for Patient Managers to schedule their own appointments in the operatory.

### **Advantages for the Patient**

- *1. Better communication.* The Patient Manager communicates with the parent at every appointment, either face to face (Fig. 3) or through a summary sheet given to the child to take home (or mailed if the comments are negative). Patient Managers give out their home phone numbers as an indication of their willingness to provide superior service, though they are rarely called.
- *2. Continuity of treatment.* When Patient Managers are aware of each step in treatment, they can better anticipate what comes next. There is great satisfaction in seeing the progress made since the previous visit. There is also less confusion about why certain procedures were performed. Appointments thus take less time. Patient Managers are especially valuable in providing continuity in multiple-doctor practices.

### **Advantages for the Orthodontist**

- *1. Reduced stress.* If a problem arises, the patient or parent can talk directly to the Patient Manager who has been working with them all along. Most situations are resolved before the doctor arrives.
- *2. Better time management.* It is easier to keep four smaller "practices" on time than one large one. Therefore, it is the staff's responsibility to keep the doctor on time, and not vice-versa. Every day the Patient Managers, new-patient personnel, and front-desk staff members meet to look over the schedule and pinpoint times when the office might run late. With a little planning, backups can be avoided.
- *3. Shortened treatment time.* It is clear from our statistics that the Patient Manager System has cut treatment time in three ways:
  - Fewer months in treatment
  - Fewer patient visits
  - Shorter appointments

The improvement in treatment efficiency is due to increased continuity and staff responsibility.

- *4. Point-of-service decisions.* Patient Managers are empowered to make all decisions within their authority. If a patient reports a lost or broken retainer, for example, the Patient Manager is the best person to decide whether to charge that patient for a new appliance.

### **Advantages for the Practice**

- *1. Improved marketing.* We have noticed a significant marketing advantage with the Patient Manager System. Patients want continuity in their care. We now have patients asking specifically for certain staff members. Our referring dentists and their hygienists feel comfortable talking to their patients' managers about hygiene or other aspects of treatment.
- *2. Increased profitability.* Each case is analyzed by gross income per visit at the end of treatment. Although no salary evaluations are based on this analysis, our Patient Managers take great pride in their efficiency and are constantly striving to reduce the number of emergencies and broken appointments.
- *3. Reduced staff turnover.* The Patient Managers have such a strong sense of responsibility toward

their "families" that they stay in their jobs longer. They feel their jobs are now more important, challenging, and personally satisfying.

- *4. Fewer staff members.* We are producing far better results with four Patient Managers than we did four years ago with seven chairside assistants. We have also been able to reduce the number of days the office is open by 25%.

We determine a Patient Manager ratio according to the formula: Total active cases/total number of Patient Managers/total number of patient days worked per year. For example, if you have 400 active cases divided by two Patient Managers divided by 200 days per year, your ratio is 1. If you have 400 active cases divided by three Patient Managers divided by 150 days per year, your ratio is .89. A normal range is 1-1.5.

When we started the Patient Manager System, our ratio was 1. Our current ratio is 1.65 – supporting our belief that the system has allowed us to do far more in fewer days.

### **Objections to the Concept**

- *1. Difficulty of scheduling.* At first, there will be some minor adjustments needed in the scheduling process. We now feel that making appointments in the operatory is more efficient than making them at the front desk.
- *2. Problems caused by staff illness.* When everyone is properly cross-trained and committed, illness will not be a problem. We have had no trouble keeping up when a Patient Manager is unexpectedly absent.
- *3. Diminished doctor/patient relationship.* Patients may bond more with their Patient Managers than with the orthodontist, but as long as they receive superior service, it is unimportant who gets the credit. In fact, the doctor has more opportunities to spend time with patients and parents when the schedule is running smoothly.
- *4. Difficulty of implementation.* The Patient Manager System requires a total commitment by the entire office, but it is not hard to get started. Here is a step-by-step list to follow in implementing the system:
  - Make a list of current patients.
  - Have the Patient Managers choose the patients they want to work with.
  - Divide up the remaining patients.
  - Designate a color to identify each Patient Manager.
  - Label each patient's chart and the Patient Manager's chair with the designated color (Fig. 4).
  - Adjust the schedule in the computer or appointment book.
  - Educate patients and parents in how the system works.

Dr. Bray now has every patient seen by the same Patient Manager starting with the initial exam. Although we have not taken the system to that level, it seems to work well for him. □

### **FIGURES**



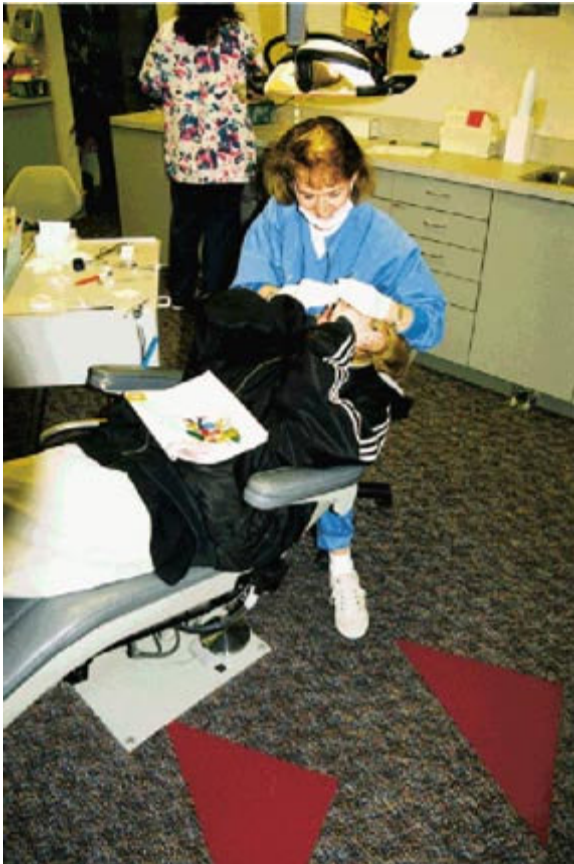
**Fig. 1** Staff members Carrie Page, Becky DeGeare, Lisa Miller, and Jaime Berve show off "their" patients on color-coded bulletin board.



**Fig. 2** Staff members develop close relationships with their patient families. Becky DeGeare is shown with Wesley Spencer.



**Fig. 3** Becky DeGeare explains treatment procedure being performed to parent.



**Fig. 4** Color coding improves traffic flow and makes it easier for patients to follow Patient Manager System. Carrie Page is pictured at her chair (note colored triangles on floor).