

FRONT OFFICE *Rocks*®

The Leader in Dental Front Office Solutions & Training

PATIENTS REQUESTING X-RAYS TO BE FORWARDED TO ANOTHER DOCTOR

From time to time, patients will decide to leave our office for different reasons. They may be moving, getting a second opinion, going to an in-network provider, etc... When that happens, they usually call to request that we forward their x-rays to the new dentist.

When receiving a call from a patient regarding forwarding their x-rays:

1. **FIND OUT WHY THEY ARE LEAVING.** You should ask something like: “Of course I can forward your x-rays, but may I ask why you are seeing the other dentist?” Your purpose here is to find out why the patient is forwarding the x-rays. You want to see if there is something that our office did that we could try to fix and/or if the patient is leaving us permanently or intends to come back to us?
2. **TRY TO REPAIR THE SITUATION IF IT IS SOMETHING WE CAN FIX:** Once you know the reason, if it something that we can try to repair, immediately attempt to handle the issue with the patient and/or escalate the call to an employee that can.
3. **IF LEAVING AND WE CAN’T REPAIR IT:** If you find that the patient is leaving for a reason that we cannot fix, such as moving, then you need to ask them to fill out Forwarding X-Rays Request Form found in Office Forms and/or minimally ask them to send us a written request via email so we can put that into their file. (The written request is only for doctors that they have chosen to go to – we do not need that request if we are forwarding x-rays to our specialists for our patient’s care).
4. **JUST THEIRS OR THE FAMILY TOO:** Next, find out if it is just one person leaving or if they have other family members that will be leaving also?
5. **CHECK BALANCE ON THEIR ACCOUNT:** Before hanging up the phone, look to see if they have a balance. If a balance exists, discuss how they plan to take care of their balance and/or escalate the call to someone who can handle that discussion. It is important to handle the financial discussion at the time of the phone call because it will be more difficult to reach them after you hang up
6. **CHECK TO SEE IF THEY HAVE APPOINTMENTS IN THE FUTURE:** Confirm that you are cancelling their future appointments immediately so you do not forget to do so when you hang up. Make sure the appointments do not go into quickfill lists, as we don’t want to have another employee try to call them in the future to reschedule them.
7. **LET THEM KNOW THEY ARE WELCOME BACK:** If they are good patients leaving because they are moving or going to another dentist due to insurance, make sure to end the phone call telling them how they are always welcome back in the future. That way if they go somewhere else and aren’t happy, they know they can always come back.
8. **PUT IN NOTES AND GIVE TO THE TREATMENT COORDINATOR AND DOCTOR:** Put good notes in their chart and explain why they are leaving and the conversation that you had. Print the notes and put them in the boxes of the treatment coordinator and doctor who worked with that patient.
9. **SCAN WRITTEN REQUEST AND FORWARD X-RAYS:** Once the written request comes into the office, scan the request and send the x-rays to the requested office.
10. **INACTIVATE THE PATIENT:** Once all the above is completed, inactivate the patient.