

CAMBRIDGE

DENTAL PRACTICE CONSULTANTS



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REFERRAL PROTOCOL

Important: The ADA Code of Ethics states, "A dentist is allowed to pay for any advertising permitted by the Code but, is generally not permitted to make payments to another person or entity for the referral of a patient for professional services".

Some states allow you to thank a referring patient after the fact of the referral with a nominal gift (\$10.00 - \$25.00) however, the referring patient cannot have an expectation of the reward.

A personally signed thank you card or note, ideally from the doctor, is smart and good manners.

You can offer a credit to new patients. The amount can be \$50.00 or \$100.00 or more. You can also offer a free cleaning or exam or nothing at all. It's totally up to you but, most find a dollar value works best.

If you offer a dollar amount still submit your usual fee to the insurance company if the referral is a PPO patient. Deduct the credit from the patient's portion. Include a note on how much and why you discounted the co-pay when submitting. If you have any concerns or questions, check with your providers.

Note: You can't offer new patient credits to Medicaid or Medicare patients due to Federal regulations.

ACCOUNTABILITY

Assign this program to a specific employee so there is accountability. The protocol only works well if it is done daily so, you want to monitor the stat "# of Quality Control Surveys Done" each day otherwise the

accountable employee may not focus or place the proper importance on it. More on the Quality Control survey in a moment.

REFERRAL CARDS

You will want a simple paper card like this.



If you prefer, replace the dollar value with a free cleaning, exam, etc. If your patient has specific people in mind to refer, fill out the card for the patient or have the patient fill out while they are in the office. If they do not have anyone specific in mind give them a few cards if they want them.

Optional: Create a letter explaining how the program works and send out to your entire patient base with five referral cards to jump-start the program.

USE OF THE QUALITY CONTROL SURVEY

- Create a Quality Control Survey. Sample below.
- When a patient completes all or part of their treatment ask them the questions on the Quality Control Survey or you can have them fill out the form themselves. You can even tell them it is being

- done as requested by your consultant or business advisor to find areas where the practice can improve customer service (true!).
- If you get negative feedback, thank them and assure the patient you will bring the matter to the attention of the office manager or doctor and, of course, make sure to do so at your next huddle.
 - If the patient is happy show them a referral card.
 - Ask the patient if there are any specific family or friends they'd like to refer. If so, write the name or initials of each person named, one card per referral.
 - If the patient can't think of anyone still give the patient cards if they want some.
 - Keep a daily log of how many Quality Control Surveys are done.
 - Include a couple paper referrals cards in any letters that go out such as statements.
 - Always send a personally signed thank you note or card to any patient that refers a new patient. Include a couple referral cards. You can include, if you choose to, a nominal gift card (\$10.00 - \$25.00). You do not need to do so but, the personal thank you note, or card is a must.

SAMPLE QUALITY CONTROL SURVEY

Information: Use this form (edit if you want to) with every patient that completes all or part of their treatment plan. You can use the form with new patients as you see fit.

Inform the patient: "When patients complete treatment in our office we do a quick Quality Control Survey to ensure their satisfaction with the service they received so we can improve our customer service."

Simply ask the questions or you can have the patient fill the form out.

Questions (change, remove or add questions as you see fit):

- Overall, on a scale of 1 to 10, how would you rate your experience at our office?

- Is there some way we can change our office that would make your visits more enjoyable?
- Did you have to wait an excess amount of time before being seen?
- Were finances explained and was your bill what you expected?
- Were you treated courteously throughout the office?
- Based on your experiences, would you refer friends and family to our office?

If the answer is yes, explain the patient referral program. If no, make every attempt to resolve the problem within the guidelines of office procedures and policies.