

Transferring Patients To Your Associate

By Catherine Etters

For those of you who are considering hiring an associate there are many steps that need to be taken that do involve quite a bit of planning and execution. Since the majority of dentists who recruit associates have been solo practitioners for their entire career, the only doctor that your patients are familiar with is **you!** Therefore, when an associate is hired whether on a part-time or full-time basis there are many factors that must to be considered:

1. **Size of Patient Base** – If you are a practice that is saturated, meaning you have more than 1,700 active patients we usually see the need for an associate. The difference between this number and your total patient base is the number of patients available for your associate. To determine the number of associate days you'll need, we recommend that for every 250 patients you will need one associate day.
2. **Patient Transfer** – The next step is to generate a master patient list and select those patients you want to retain as your patients. The excess patients will be transferred to the new associate. It is a good idea to place a sticker on the chart to identify those patients who will be transferred.
3. **Patient Reactivation** – We find that many practices that have an over abundance of patients have a recare system where many patients do not participate on a regular basis. Therefore, there are significant reactivation opportunities to re-enroll patients back into the practice and transfer them to the associate. We also recommend that instead of hiring a new hygienist, to see these patients initially we prefer to schedule these patients for their first reactivation recall with the new associate. If clinical treatment is required the new associate can take care of their needs. The patient then will be assigned to a new hygienist who will be hired to treat them thereafter.
4. **Scheduling Templates** - We recommend that scheduling templates be developed to provide a clinical visit each day. We typically recommend 2-4 reactivation hygiene visits per day based upon the number of patients available. The rest of the day is filled with emergency visits, new patients and clinical appointments.

5. **Patient Transfer** – There is a lot of work needed to be done in this area since we essentially are telling our patients that they are being transferred to another doctor. Since your patient is strong it is important for you as well as your team members to inform the patients that the associate has been “hand picked” by you and that you have every confidence in this new doctor’s ability to take care of them. This is a fairly powerful transfer and often times verbal skills are needed to properly provide your team members with appropriate verbiage to overcome patient’s objections as well as answering questions on background skills and abilities of the new associate.

6. **Marketing** – There are many ways that an associate can be properly introduced to your patient base. For those who have a newsletter, this is an excellent vehicle. You can also write a letter to your patients if you have no newsletter. Another idea is to place a photo in the office. If you have information on hold on your phone, you can create a section that will introduce your associate.

7. **Size of Facility** – In practices where there are 4 or less operatories, integrating an associate can be a scheduling challenge. Therefore, scheduling templates for all providers need to be prepared so that maximum use of the facility can be attained as well as maintaining clinical production.

In summary, there are many factors that need to be considered when hiring your first associate. Your team is the most critical ingredient in assuring that your patients transfer successfully to your associate.