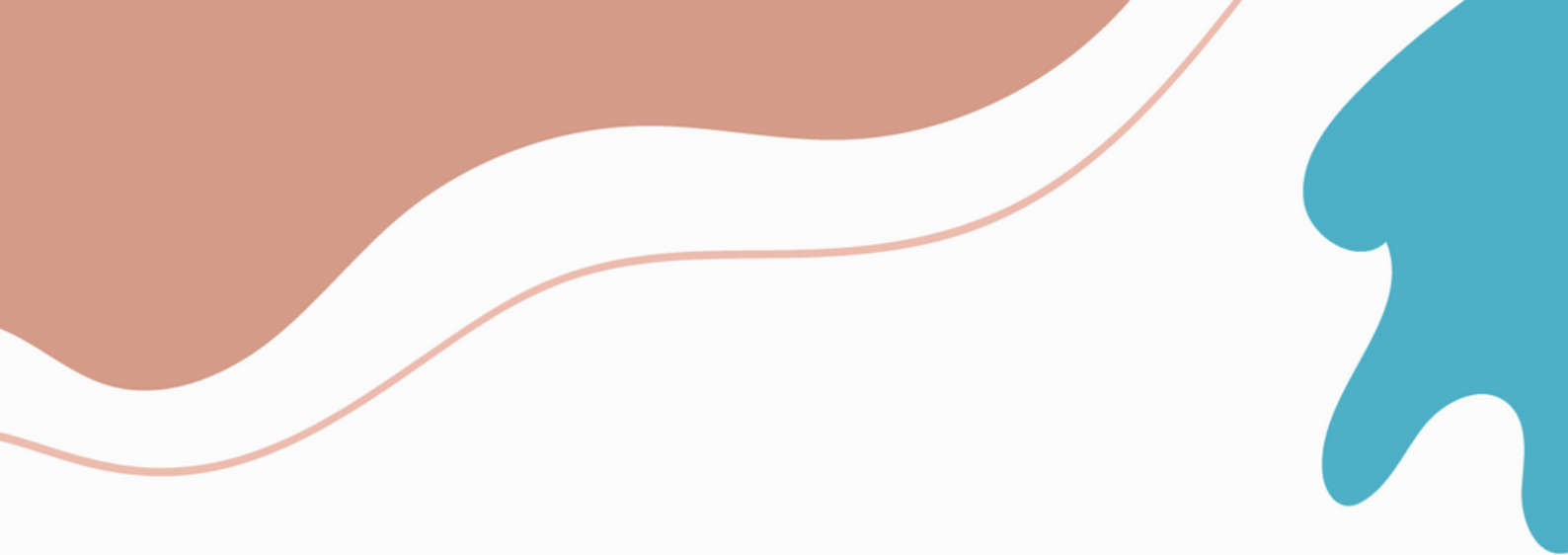




CASE ACCEPTANCE: CHAIR-TO-FRONT HANDOFF TOOLKIT

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Successful treatment acceptance starts with one powerful transition the handoff. This toolkit is designed for dental practices to use as a guide, training aid, and performance tracker for improving the handoff process from the operatory to the front desk. When everyone on the team delivers a consistent, confident message, patients are more likely to say YES to treatment.

Why the Handoff Matters

Inconsistent handoffs lead to confusion and missed opportunities. When the clinical and administrative teams are aligned, patients feel supported and understand the urgency of their care. This creates a seamless experience that builds trust, reduces objections, and increases case acceptance.

Common Breakdowns in the Handoff

- ✗ Dentist walks out without saying anything to the front desk or TC.
- ✗ Mixed messages between clinical urgency and admin tone.
- ✗ No introduction of who's taking over the next step.
- ✗ Patient left to 'check with spouse' and walks out unscheduled.



Daily Handoff Checklist



- ☐ Dentist clearly states the problem, solution, and urgency (e.g., 'deep cavity, needs crown within 2 weeks').
- ☐ Dentist introduces the team member who will take over (e.g., 'Kyle will go over next steps with you').
- ☐ Dentist walks the patient physically to the next point of contact.
- ☐ TC uses visual aids or treatment estimate printouts when possible.
- ☐ TC walks patient through insurance breakdown and payment options.
- ☐ Front desk offers 2+ dates to schedule treatment before patient leaves.
- ☐ Patient receives digital or printed confirmation and instructions.

Team Member Initials: _____ Date: _____

Patient Name: _____

Treatment Plan #: _____



Chair-to-Front Handoff Script Prompts

These scripts serve as training tools to improve verbal transitions between dental team members. Practice them until they become second nature.



Dentist >>>> Treatment Coordinator

- ◆ 'Mrs. Smith has a cracked molar that needs a crown. Kyle is going to walk you through what this looks like with your insurance and help schedule it today.'
- ◆ 'John, I've explained the treatment needed. Kyle will take care of the rest and answer any remaining questions.'

Treatment Coordinator >>>> Front Desk

- ◆ 'We've gone over her insurance breakdown. She's ready to schedule her first crown prep visit.'
- ◆ 'She's using CareCredit for the balance. Let's get her scheduled for next week while the temporary is still stable.'

Handling Common Objections

- 'Totally understand we can hold your preferred time while you double-check with your spouse. Does Monday or Thursday work better for now?'
- 'We can work within your budget. Would you like to see a payment plan option or use your HSA? Let's explore all options.'



Role-Based Responsibilities in the Handoff

Dentist

- ✓ Confirm diagnosis and sense of urgency with confidence.
- ✓ Never leave the patient wondering 'what now?'
- ✓ Introduce the next person (by name).

Treatment Coordinator

- ✓ Translate treatment into understandable, non-clinical terms.
- ✓ Present fees and insurance estimates clearly.
- ✓ Address hesitation gently and provide solutions.

Front Desk

- ✓ Reinforce urgency with appointment availability.
- ✓ Ensure all questions are answered before the patient leaves.
- ✓ Provide written or digital confirmation of appointments and payments.

👉 Download more free tools and templates at www.dentalofficemanagers.com

