



THE FIVE PHASE EXAM™

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Practice Production Whitepaper Series



Levin Group Inc.



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Introduction

Each patient should be evaluated for ideal treatment. In most practices, patients are assessed for specific and immediate needs rather than comprehensive treatment. For example, a new patient may present to the office with a single-tooth emergency, have that tooth treated and remain in the practice recare program without ever receiving a comprehensive exam.

A different way to approach this, and one that should also be used for every new patient, is to fully examine the patient for all possible treatment options. Levin Group teaches a Five Phase Exam™ that was created to highlight comprehensive dentistry. The Five Phase Exam has been developed and refined by Levin Group over the past 25 years through consulting to thousands of dental practices. It includes these five steps:

1. **Periodontal Exam**
2. **Tooth-by-Tooth Exam**
3. **Cosmetic Exam**
4. **Implant Exam**
5. **Occlusal Exam**

This type of examination can help the practice provide a wider range of services to patients while leading to an increase in the average production per new patient. The Five Phase Exam is a step-by-step system that should be followed in the order listed here for the most effectiveness:



Phase 1: Periodontal Exam

The majority of practices do not probe and record pocket depths on an annual basis. Despite all of the different diagnostic approaches to periodontal disease, periodontal probing is still the most critical.

It is a definitive measurement of pocket depths that allows doctors to make a decision as to whether initial therapy and other treatment is necessary. While it is a strong Levin Group recommendation that practices probe and record pocket depths annually, it is just as essential to probe and record the pocket depths of every new patient. A dentist, working with an assistant, can accomplish this task in a few minutes. Those few minutes should be invested to determine whether a significant service can be provided to the patient.

Each phase of The Five Phase Exam will be introduced with a separate script. This creates a strong focus for the doctor and an equally strong understanding for the patient. Also, keep in mind that one of the goals is for patients to recognize that the exam being provided by this office is much more thorough and comprehensive than any they may have undergone before. If the patient needs periodontal therapy, this can be indicated in the treatment presentation that will be made at the end of the appointment.

Phase 2: Tooth-by-Tooth Exam

Dentists are attuned to identifying tooth problems more so than any other oral health issues, which may be reflective of our dental school training. When addressing patients, be sure to speak in layman's terms and not overly clinical jargon. Instead of using terms such as maxillary or number 30, it makes more sense to discuss upper teeth, front of teeth and bottom right first molar. This allows patients to be part of the educational process and gain a better understanding of their oral health.

Scripting for this part of the exam can be as simple as, "Now, Mrs. Smith, we are going to begin your tooth exam. I will examine each tooth to determine the quality of health, restorations and any potential issues that may be involved with your teeth."

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Phase 3: Cosmetic Exam

The cosmetic exam is also a critical aspect of the new patient examination. General dentists have tremendous options in the area of cosmetic dentistry from whitening to veneers to crowns and bridges. While I certainly recognize that cosmetic dentistry falls into the category of desirability versus need, it is not always addressed with the same emphasis as other basic dental services. The cosmetic exam should be kept relatively simple but powerful in its education and influence. The best way to do this is to use a hand mirror and a shade guide. Simply have the patient watch in the hand mirror as the doctor scores each anterior tooth against the shade guide. Explain to the patient what the shade is of that tooth versus what it could be. There's no point in commenting as to whether it is a necessary procedure or even recommend it. The comparative effect of this procedure creates motivation on the part of the patient as to whether cosmetic dentistry would be beneficial.

The cosmetic exam becomes of great interest to many patients. Be sure to answer every question in a positive way, taking plenty of time to provide the answer. This way the excitement the patients are beginning to create for themselves will be followed through by the doctor and the team.

Phase 4: The Implant Exam

Almost any patient missing a tooth qualifies as a potential implant patient. Once again, the implant examination should be introduced with a script explaining that the practice routinely screens mouths to determine if dental implants would be beneficial. Many patients are vaguely familiar with the concept of dental implants. This is an opportunity to not only educate edentulous patients about any specific needs, but also to educate patients who do not need implants so that they can tell their families and friends. Many implant referrals have occurred through better patient education even when the patient does not need implants for his or her particular situation. The implant exam should be short, but definitive with a full explanation about dental implants.

Phase 5: The Occlusal Exam

The occlusal exam requires using articulating paper to mark the teeth and allowing the patient to see the different markings on the occlusal surfaces of teeth. This may be the first time that patients have ever understood how teeth actually fit together and what the bite is really all about. Whether the doctor feels that any occlusal intervention is necessary, it is another way of differentiating the practice from all others. The occlusal exam will often reveal issues that need to be addressed in other types of treatment.

Conclusion

The Five Phase Exam is a powerful process that allows patients to have an improved understanding of their oral health. It also gives doctors and team members a step-by-step process for providing a higher level of care to patients. All too often areas, such as cosmetics, implants and occlusion, are ignored when in fact they are critical to the future of many dental practices. Keep in mind, as noted in many other white papers on the **Levin Group Practice Production Center** that elective dentistry is now a major portion of practice success and cannot be ignored. As a summary, the important factors of The Five Phase Exam are:

- Cover each phase one at a time.
- Introduce each phase with a script.
- Use each phase as an educational opportunity.
- Do not overwhelm the patient by using highly clinical language.

The Five Phase Exam is a critical component of practice success today. Levin Group pioneered The Five Phase Exam as an opportunity to increase the average production per new patient by ensuring all services are covered.

The Five Phase Exam doesn't take much longer than a normal new patient examination, but it results in more recommendations for ideal treatment, which leads to increases in the average production per new patient. This means that fewer new patients will be necessary for each practice and practice production will increase overall.

In a world where competition increases, insurance companies work to maintain or reduce doctor fees and benefits change on a regular basis, it is critical for practices to incorporate not only basic dentistry, but also elective dentistry and comprehensive dentistry. This can occur by implementing The Five Phase Exam very naturally without any additional expense or great departures from more traditional doctor examinations.

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Dr. Roger P. Levin is a third-generation general dentist and the Founder and CEO of Levin Group, Inc., the largest dental practice consulting firm in North America. A keynote speaker for major dental conferences, Dr. Levin presents more than 100 seminars per year. He has authored 68 books and more than 4,000 articles. In 2014, he received the Dental Excellence Award for Best Practice Management Consultant from *DrBicuspid.com*. For the past 12 years, he has been named one of the "Leaders in Dental Consulting" by *Dentistry Today* magazine.



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