

Patient Experience Assessment Worksheet

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Below are a few key touchpoints to reflect on as you walk through the entire patient experience.

- ✦ Step 1: Use this worksheet to guide your observations and reflection.
- ✦ Step 2: With the second worksheet, create a short narrative — first, through your patient's eyes, describing what they are seeing, hearing, and feeling at each stage of the journey.
- ✦ Step 3: Do the same exercise again, but this time, describe what you believe the experience could look like if it were elevated and intentional.

This simple exercise helps uncover your “broken windows” — the small cracks in the patient journey that can quietly impact trust, comfort, and connection.

The “Before” Experience

Through your patient's eyes, what does the experience look like before their appointment? Consider their journey from the very first moment of contact with your practice:

- 🌐 Website First Impressions: What does your website look and feel like to a new patient? Is it modern, clear, and welcoming?
- ✉ Online Communication: Do you have a web or contact form? How quickly and warmly is the response sent back when someone reaches out?
- 📅 Ease of Scheduling: Is there an option to book online, or is it easy to reach someone by phone?
- 📞 Phone Experience: When patients call and leave a message, how quickly do they hear back? How are they greeted when someone answers the phone?
- 👋 Front Desk First Contact: Is the person answering or welcoming patients friendly, warm, and genuinely inviting? Remember, this is the first live impression of your practice.

Section 1: Appointment Scheduling

Ease of Scheduling

Rate the ease of scheduling an appointment online or over the phone (scale of 1-5).

Comments:

Appointment Availability

Were you able to schedule an appointment at a convenient time? If it was an emergency, were you able to get in? For your hygiene appointment, were you able to schedule for the time recommended?

Comments:

Patient Experience Assessment Worksheet

The “During” Experience

Through your patient's eyes, what does the experience look and feel like during their appointment?

This is the heart of the patient journey — where trust is built, care is delivered, and impressions are solidified. Consider how each step of the appointment impacts comfort, clarity, and connection.

Think about:

-  Team Communication: How warm, clear, and collaborative is the interaction between the team and the patient?
-  Clinical Care & Comfort: How thorough is the assessment and care provided? Is the patient informed, involved, and comfortable throughout?
-  Education & Engagement: Are findings and recommendations explained in a way that the patient understands and feels empowered by?
-  Technology & Tools: Is the experience enhanced with modern equipment, visuals, or tools that elevate the visit?

Section 2: Reception and Check-in Process

Welcoming Atmosphere

Rate the overall atmosphere and friendliness of the reception area (scale of 1-5).

Comments:

Check-in Process

Evaluate the efficiency and clarity of the check-in process. How were you greeted? Are you greeting them by name?

Comments:

Section 3: Reception Area (music, clean, furniture, television screen)

Wait Time

Rate the time spent waiting before being called in (scale of 1-5).

Comments:

Comfort and Amenities

Evaluate the comfort of the waiting area and available amenities.

Comments:

Patient Experience Assessment Worksheet

Section 4: The Appointment

Communication with Team

Rate the communication and friendliness of the team (scale of 1-5).

Comments:

Thoroughness of Examination:

Assess the thoroughness of the examination. (ie probing, thorough Oral Cancer Screening, head and neck examination, education/explanation)

Comments:

Consistency:

Are your patients receive consistent care between clinicians?

Comments:

Section 5: Treatment Options and Explanation

Explanation of Treatment Options

Rate how well the dentist explained treatment options (scale of 1-5).

Hygiene Appointment:

Explanation of appointment, include patient, set goals

Take-aways (oral health aids to send home with patient); explanation; send tear-away sheet with problem areas, personalize their take-away bag)

Comments:

Technology (are you staying current and offering leading edge treatment? ie Laser, Woodpecker)

Patient Experience Assessment Worksheet

Financial Information:

Evaluate the clarity of financial information related to treatments.

Comments:

The “After” Experience

Through your patient's eyes, what does the experience look like after their appointment?

How will they think and feel about your practice when they're not in the chair with you? Consider how your follow-up, communication, and ongoing presence reinforce the trust and connection you've built during their visit.

Think about:

- 📧 Follow-Up: How do you stay connected after the appointment? (e.g., thank-you messages, follow-up calls, personalized notes, or emails with next steps.)
- 🌱 Ongoing Relationship: How do patients feel between visits? Do they feel cared for, remembered, and valued?
- 🌟 Lasting Impression: What will they tell their friends or family about their experience with you? How are you staying top of mind in a warm, authentic way?

Section 6: Post-Appointment Experience

Follow-up Communication

Assess the effectiveness of follow-up communication (e.g., post-treatment instructions, a phone call or email).

Comments:

Overall Satisfaction

Rate your overall satisfaction with the entire patient experience (scale of 1-5).

Do you offer an evaluation? A chance for your patient to review their experience?

Does the office stay connected with patients following the appointment and in between appointments (ie Newsletters, social media, email campaigns)?

Comments:

Feel free to customize this worksheet based on the specific needs and aspects you want to focus on in your dental office. These are just a **few** examples to help you think about ways you can improve the **Before, During and After** experience for your patients! This can be used periodically to gather feedback and continuously improve the patient experience.

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Worksheet 1: The Current Patient Experience — Through Their Eyes

Instructions:

Use this sheet to write a narrative as if you were the patient, starting from the moment you first heard about your office or came across an ad — and walk through every step of the journey from Before, During, and After the appointment.

Imagine you're the patient experiencing it today.

- ✦ What are you seeing?
- ✦ How are you feeling at each touchpoint?
- ✦ What stands out — both the good and the areas that could be better?

Be honest and detailed. The goal here is to see your patient journey with fresh eyes, uncover the quiet “broken windows,” and identify opportunities to elevate the experience.

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★ Worksheet 2: The “Dream Come True” Patient Experience

Instructions:

Now, imagine you could design the ultimate patient experience — the kind of experience that would make a patient say “Wow!” and tell everyone about your office.

Write a narrative from the patient’s point of view, describing what this ideal experience could look like from start to finish. Don’t limit yourself to what’s already in place — think creatively and boldly.

- ★ What would make them feel cared for, valued, and delighted?
- ★ What personal touches could turn a good appointment into a memorable one?
- ★ How could technology, hospitality, communication, or small details make it a “dream come true” experience?