

Presentation of Charts



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Since patients and profits make up most of the value in a dental practice sale it is important that patient charts present themselves in the best possible light. There are a number of important steps that should be undertaken before a valuation is started.

1. Make a concentrated effort to re-activate the patients who have not kept their visits up to date.
2. Remove from the active files the charts that are three, four or more years since the patient was last in the practice.
3. Have adequate space in your chart drawers or shelves to hold your active charts. Charts should be easily accessible (i.e., not packed so tightly that one is unable to pull or return a chart easily).
4. Ensure plastic hangers are in good repair (i.e., plastic hangers should be replaced when broken or bent). This helps prevent the loss of files that have fallen from a hanger and slipped beneath the rest of the tightly packed charts.
5. Torn or worn out file envelopes look bad to the patient and are harder for the staff to file.
6. Charts that are hard to access make more work for your staff and contribute to inefficiency.
7. If the charts are in drawers, the drawers should run smoothly when pulled out and pushed back in. Tracks should be kept in good repair.

If these simple steps are taken into account and followed routinely, your staff will not only appreciate it but it will make them more efficient. When the time comes to sell your practice the charts will look neat and are easy for the purchaser to review, and it will be evident that they won't have to spend money afterwards replacing charts.

With the new privacy considerations it may be an ideal time to convert to a more contemporary chart system where the charts are sitting on a shelf with colour coded files in lockable cabinets. These new files take up less room than those in pullout drawers and because the charts are sitting on a shelf, the shelving can be higher and hold as many files as needed. Also, you don't need three feet of access in front as is necessary for the drawer system. The paper does not have to be folded in thirds as the files are 9" x 12". The files are generally plastic coated for rigidity and easier to pull out and insert back on the shelf. There are many suppliers and quite a price range for these new files and it will be to your advantage to obtain a number of estimates.

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