Training Manual
Treatment Coordinator

The information in this manual will help ensure our practices run as smoothly as possible. They will be updated regularly and therefore should be reviewed often.

As new memos and information become available these manuals will be updated and distributed accordingly.

These job descriptions have been carefully thought out and planned. Job descriptions help avoid miscommunication and frustration in the office. These manuals are viewed as guides and we expect everyone to work as a team. **If you are good enough to work at Thrive you are good enough to handle any task asked of you. Saying "it's not my job" should never be uttered by our team members**. We pride ourselves on being a team and therefore you must be the best team player possible. We do whatever it takes to support everyone in the office to allow an outstanding patient and staff experience.

We have very high expectations for our team members.
Our employees have an extremely high attendance rating. Many employees have never missed a day of work and they are the ones who advance the highest at Thrive. If you have a serious emergency you **MUST COVER FOR YOURSELF**. Do not burden the managers with having to find someone to fill in for you. You should have a list of fellow employees and call every person on that list to help you during your emergency. Once all avenues are exhausted then you can contact your manager for help in coverage during your absence.

Thrive Standards

Before anything, let's review our standards here at Thrive

1. **SERVANT LEADERSHIP**. We are servant leaders who lead with love. We always take the initiative. We care deeply and elevate the people around us.

2. **COMPASSION**. Always show compassion and empathy to patients and one another.

3. **SMILE**. Always. We always answer the phone with a smile. We greet our patients with a smile, and we always call them by their names.

4. **WELL-GROOMED**. We are in a highly professional environment with high standards. We must look the part. This means looking sharp, good hygiene, dressed professionally, and with light makeup and hair done.

5. **POSITIVITY**. Create a positive and family spirit. We are are family! We choose to have a positive attitude and help our team succeed.

6. **HIGHEST STANDARDS**. We insist on only the highest standards. This includes the highest standards of dental care, customer service, professionalism, accountability, promptness and cleanliness.

7. **INTEGRITY**. We do everything with absolute integrity. We do not tolerate dishonesty or violation of HIPPA protocols.

8. **PROMPTNESS**. Promptness is an absolute requirement. No excuses. We want to be prepared ahead of time for our patients' arrival.

9. **TEAMWORK**. We always take the initiative to help our team succeed. If the bathroom needs to be cleaned, clean it. We never say, "that's not my job."

10. **EXPERIENCE**. We do everything in our power to deliver an awesome AWESOME experience for our patients EVERY time. Every team member asks the patient, "How was your experience?" (3 times total)

11. **ASSURANCE**. We comfort dental fears with loving care. We reassure our patients that they are in the best hands. We constantly check in with our patients, showing concern for their comfort and well-being.

12. **COMMUNITY**. We build strong and healthy communities. We serve our communities with love and generosity. Each of us represents the Thrive name. Tell everyone about us!

13. **GROWTH**. Commit to constant growth and learning. At Thrive, we empower each team member to become the servant leader they were created to be.

14. **FUN**. Have fun and dream big!

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Section 1

Chair 4/Treatment Coordinator

A. Job Description

The treatment coordinator's primary missing is getting patients to stay for same-day treatment. This is likely the most important role in the front because if patients do not stay for treatment then office hours have to be cut and bonuses are not earned.

Your primary job is to get patients to start treatment but you must also help in all front desk duties. You must also help with internal and external marketing, filling the schedule with unscheduled treatments, recall appointments, etc.

B. Opening Duties

- Review the schedule and look for any potential opportunities
- Return any treatment-related phone calls and emails
- Make sure all treatment coordinator sheets from the prior day are completed.
- Assist front desk team members with opening duties.

C. Treatment Planning

It is essential for treatment plan coordinators to be familiar with insurance, dental treatment, and patient concerns so they can help patients stay for the treatment they need. On every treatment plan you will see a lot of information that WILL BE DAUNTING for nearly every patient.

If the patient has a lot of treatment we must break it down into smaller pieces so the patient can understand and be more likely to start. Patients typically look at the biggest numbers only so it is imperative that we guide them by pointing directly to the treatment plan and breaking treatment into proper segments.

On each treatment plan, there are 12 columns along with a tooth visual aid and insurance information at the bottom.

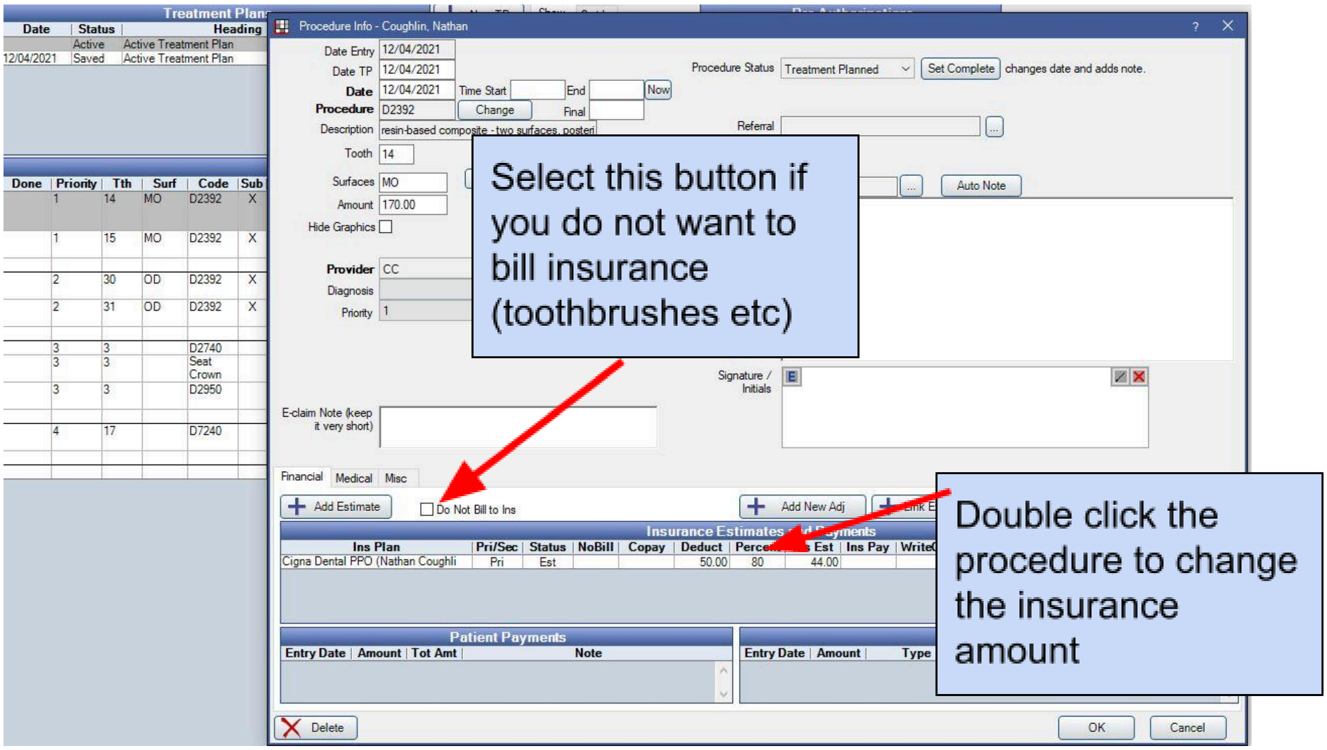
From left to right it shows the status (Done), Priority, Tth (tooth #), Surf (surface of the tooth), Code (code for treatment), Sub (if a procedure gets downgraded), Description of the procedure, Fee (Fee we are charing the patient), Allowed (will only show a number if we have to downgrade), Pri Ins (primary insurance), Sec Ins (secondary insurance), Pat (patient portion).

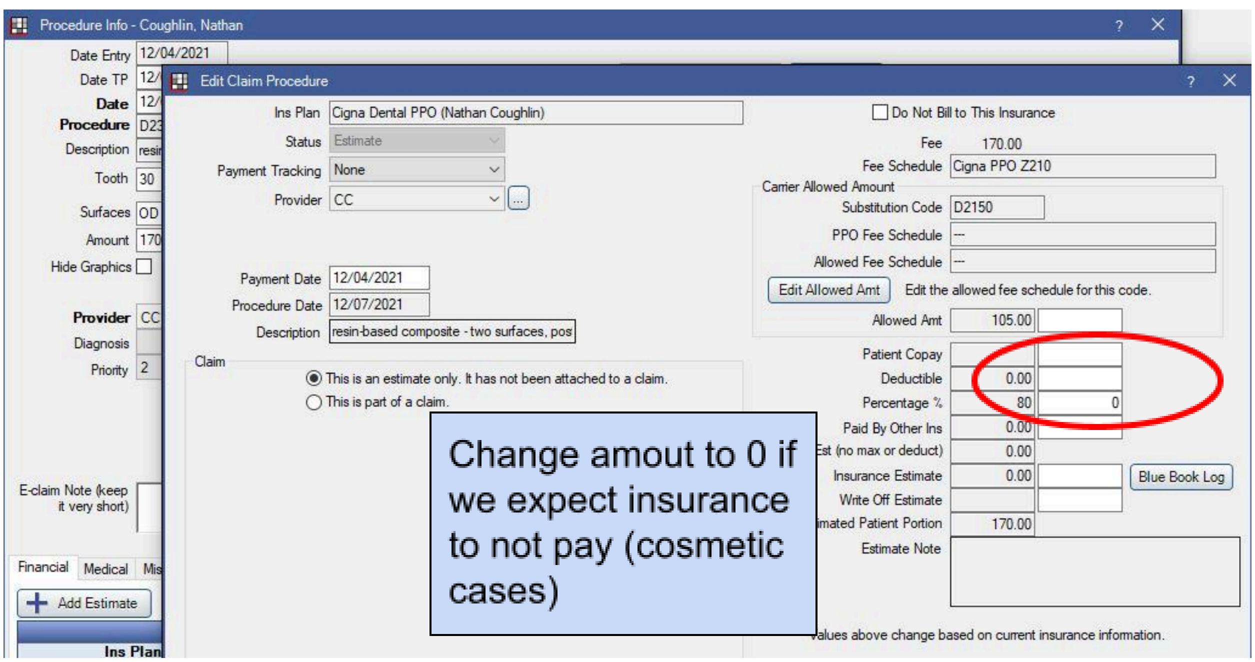
Treatment Plan Steps:

1. Complete the patient Exam and X-rays. The exam is under the correct provider and Xrays are under “office”.
    a. If the patient is able to stay for same-day cleaning or treatment that will be a separate appointment in open dental.
2. Phase the treatment plan according to the following order.
    a. Patients CC if it’s pain
    b. SRP
    c. Fillings
    d. Root Canal / Crown / Buildup
    e. Bridge
    f. Implants
    g. Wisdom teeth extractions
    h. Veneers
3. Always review the patient's insurance before presenting treatment. Check the patients:
    a. SRP history and treatment history
    b. Type of fee schedule. If you change the fee schedule make sure to update the treatment plans fees
    c. SRP frequency, Missing tooth clause and waiting period. If these are not checked properly the entire treatment plan may be wrong.
        i. If there is a waiting period that means you must zero out all insurance payments for those particular procedures.
        ii. MTC (missing tooth clause). If there is an MTC then you MUST ZERO OUT the insurance portion if the patient ALREADY HAS TEETH MISSING IN THAT AREA.
            1. This applies to bridges, partials, implants, etc. If the patient is missing tooth #8 and wants a bridge from 7-9 the insurance will pay zero if there is an MTC on that plan.
    d. Implants: Check the patient’s WP, MTC, and if they have any coverage. We typically run implant specials so check with your manager to see what cash pricing may be.
    e. Veneers or Cosmetic Crowns: Zero out the coverage as insurance typically does not pay on cosmetic cases.
        i. Wax-up fees are typically needed with these cases and are an extra fee.

To mark a procedure as “Do not bill to insurance”, open the treatment plan module, select the procedure you want to not be sent to insurance.

To Zero out insurance, open the treatment plan module, select the procedure you want insurance to pay zero, double click in the “Insurance estimates and payments” area. Change the insurance amount to 0.

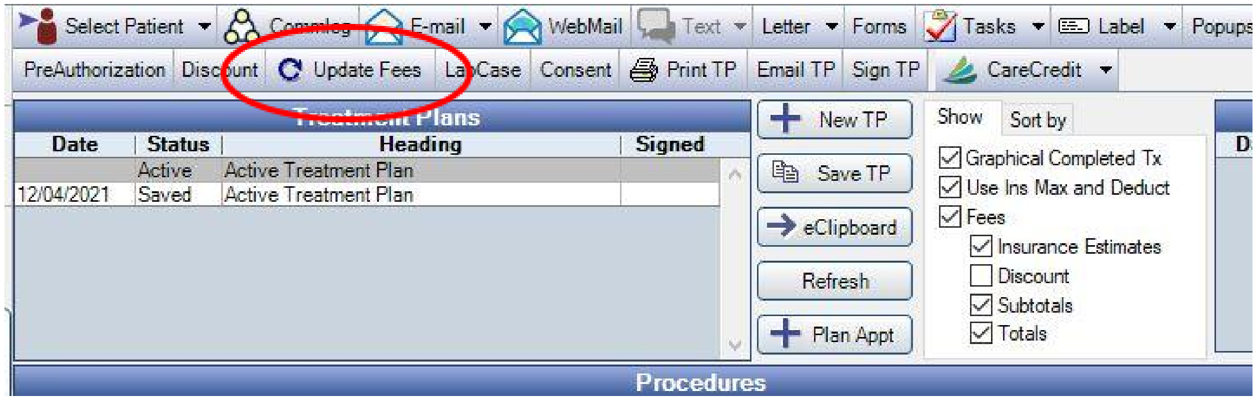




Updating Fees:

It is common for a patient to get booked for a new patient exam and they may be under the office's UCR fees or other insurance plans fees.

When making changes to the insurance make sure to correct the fee schedule and "Update fees". If you do not do this the entire treatment plan will be incorrect, the EOB will not match and patients will be upset.

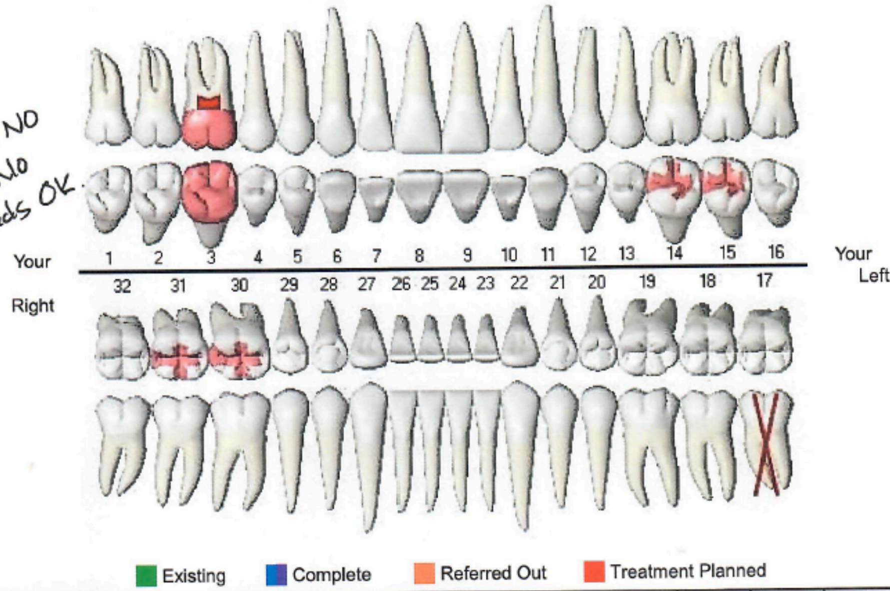


After all the information is entered correctly and phased appropriately print out the treatment plan with the following information:

1. Op#
2. Any waiting periods (WP)
3. Any missing tooth clause (MTC)
4. SRP frequency

12/04/2021

OP3
MTC= NO
WP= NO
4 Quads OK.



Done	Priority	Tth	Surf	Code	Sub	Description	Fee	Allowed	Pri Ins	Sec Ins	Pat	
L	1	14	MO	D2392	X	resin-based composite - two surfaces, posterior Pri Deduct Applied: $50.00	170.00	105.00	44.00	0.00	126.00	
	1	15	MO	D2392	X	resin-based composite - two surfaces, posterior	170.00	105.00	84.00	0.00	86.00	
						Subtotal	**340.00**	**210.00**	**128.00**	**0.00**	~~**212.00**~~	$200
R	2	30	OD	D2392	X	resin-based composite - two surfaces, posterior	170.00	105.00	84.00	0.00	86.00	
	2	31	OD	D2392	X	resin-based composite - two surfaces, posterior	170.00	105.00	84.00	0.00	86.00	
						Subtotal	**340.00**	**210.00**	**168.00**	**0.00**	~~**172.00**~~	$100
	3	3		D2740		crown - porcelain/ceramic	968.00	0.00	484.00	0.00	484.00	
Crown	3	3		Seat Crown		Seat Crown	0.00	X	0.00	0.00	0.00	
	3	3		D2950		core buildup, including any pins when required	177.00	0.00	141.60	0.00	35.40	
						Subtotal	**1145.00**	**0.00**	**625.60**	**0.00**	~~**519.40**~~	$500
Wisdom	4	17		D7240		removal of impacted tooth - completely bony	351.00	0.00	280.80	0.00	70.20	
						Subtotal	**351.00**	**0.00**	**280.80**	**0.00**	~~**70.20**~~	Ø
						Total	**2176.00**	**420.00**	**1202.40**	**0.00**	**973.60**	

Family Insurance Benefits

BenefitName	Primary	Secondary
Family Maximum		
Family Deductible		

$800 Total.

Treatment planning Virtues

- A patient's treatment plan can be daunting and tough to navigate and that is why we need excellent coordinators to guide the patient to same-day treatment.

- When presenting make sure to "show and tell" the patient so they can follow along. Do not over-explain procedures, rather guide them along the treatment plan journey

- Assistants and doctors are told to organize treatment plans in quadrants and from cleanings to fillings to RCT/Crowns/BU unless there is a chief complaint. It is the job of the treatment coordinator to ensure the treatment plan makes sense from a patient perspective.

    - Therefore you should not have too many procedures in one phase especially if insurance will not cover the whole phase.
    - It would be more intelligent to phase out treatments according to visits and insurance maximums.
    - When trying to phase out insurance it would be best to keep over the yearly maximums on different phases so it is clear for the patient to see anything over phase X is not covered this year but could easily be done next.

- Our goal at Thrive is to maximize insurance benefits. The patients have already paid for these benefits so it is our goal to help the patients utilize what they have already paid for.

- TCs (treatment coordinators) should review the schedule in the mornings and after lunch to make sure there are no treatment planning errors.

- Any treatment payment plans must be clearly marked on the treatment plan paper and signed by the patient. This will prevent confusion in the end. Do not mark multiple payment plans, various monthly payments, deductions, etc on one treatment plan. If needed print out an entirely new plan and clearly mark on the plan the special you gave to the patient.

- We emphasize same-day treatment at our offices. The patient is already in the chair and ready to receive treatment. They save us time by already being in the chair so we should offer discounts for same-day treatment.

- All staff should understand what a missing tooth clause is. This is when a patient comes in with a missing tooth and would like a bridge, implant, etc for that missing tooth. If the insurance has an MTC then they will not cover that bridge/implant etc.

- Remember SPEED/ACCURACY IS EVERYTHING. Patients are more likely to stay if the new patient exam and treatment presentation are done in a speedy and accurate manner. If the patient is waiting for 30 minutes for a treatment plan they are very unlikely to stay for treatment.

- Review the patient's chart for any medical conditions that would prevent us from starting that same day.

- Review the patient’s ledger to see if they have an HSA or FSA card as they will likely want to use that for further treatment.

Communication:

Communication is key to selling a treatment plan. Remember we are “selling” an amazing product which is dental health and confidence. We are the luckiest people in the world because we are doing things that will make patients healthier, happier, and more confident and insurance may pay for the majority of treatment

Be confident while presenting, look patients in the eye, and also be on eye level. Confidence is contagious but so is a lack of confidence and a shaky voice. Patients want you to feel empathy towards them and that you have the confidence to take care of their issues. We teach empathy and confidence to everyone including our doctors.

Knowing the patient's history, insurance benefits, if they have an HSA, etc before the actual appointment will help you speed up presentations and show the patient you know about their specific plan.

"Good morning Mrs. Smith! My name is _____ and I am the treatment coordinator. How are you doing today? (wait for response) I am going to go over your treatment plan that Dr. ____ made for you and how your insurance is going to help you with that cost and then I'll answer any questions you have. How does that sound?

After the patient has given you permission to continue and has said "yes" multiple times you guide them through the process.

Take cues from how the patient is acting. Some people want you to give them the facts and how you will save them money asap. Other patients want a detailed explanation of every little procedure. Take cues from the patients and act accordingly. Emphasize SAME DAY TREATMENT and because they are saving us the time we will save them money.

"***Ok Mrs. Smith, we want to get your mouth back to its pristine condition and save you as much money as possible. We can get there by starting with this first step today"***

It is generally best to keep treatment plans very brief. Most patients want to see the overall picture and have you guide them through the process. It is your goal to guide patients to same-day treatment as soon as possible. Always point to the treatment plan and clearly mark what can be done today.

It is important to notate to patients that they can save more money if they do multiple items in one visit. The whole concept is that if a patient does more fillings at once we do not need to bring them back therefore we save chair time/money so the patient saves money. We want to reward patients for saving us time. It takes a lot of time to clean a room, take blood pressure, turn on Netflix, numb the patient, etc therefore if we can do more in one visit we save time and we should transfer those cost savings to the patient. "We save time, you save money!"

Common phrases you should incorporate are "***Metlife has you covered for the majority of the costs***", "***Oh you have Aetna so they will cover most of the cost"***, "Wow you have great insurance so they are going to cover a lot for you".

You should be prepared for any objections that will come your way but they boil down to 3 main objections:

1. Pain. They believe the procedures will be painful.
2. Time. They are in a rush to get back home.
3. Money. They believe dentistry in our beautiful offices has to be very expensive.

Overall script:

Concerns of pain

We treat our patients like family and we use a variety of methods to ease their discomfort. All of our doctors use a topical anesthetic gel to numb the area before they insert the needle. If done properly many patients do not feel the needle.

If they are very anxious the patient should be offered nitrous oxide (laughing gas) or perhaps some light sedation (medication) to be taken before the appointment.

Some patients are extremely anxious and for that, they can be offered IV sedation where they will not remember anything about the procedure. For IV sedation we bring in a specialist who monitors them during the appointment.

Specific treatments may not even require numbing, such as an SRP, can be done with a strong topical anesthetic.

Concerns of Time

First off we should be preparing patients from the moment they call in for a new patient exam. They should be aware that we will attempt to do the same-day treatment. We also must be very prepared so the patient is not waiting in the lobby or operatory room.

Also saying things like “it’ll never take less time than it will today” is an accurate statement because as mentioned it takes time for patients to check-in, sit down, etc. but they are already in the chair ready to go now.

If a patient asks about how much time, say ambiguous things like “no time at all” as we do not want to lock our back staff into specific time constraints. If a patient wants a more accurate time, ask your lead RDA.

Furthermore giving a large discount to a time-constrained patient can make them quickly find the time!

Cost concerns

We want to work with patients to make sure they get the treatment they should. Remember cavities do not get smaller therefore it behooves us to work with patients to help them today.

Each office should have a **minimum acceptable amount** for various procedures. When in doubt consult our Thrive Dental plan to view averaging pricing. If a patient has high fees and great insurance we should be offering them tremendous discounts to get started today.

Always keep in mind that if a seat is empty we are losing money. We should be keeping all seats full at all times. If you have been with us for some time you know that as the offices do better we compensate employees more.

It is your job to become a master financier and help patients get the treatment they need. You can offer payment plans, CareCredit, look at their FSA/HSA cards, reverse layaway (paying for procedures a little each week until they can afford it), etc.

Financing should rarely be the issue as we will do whatever we can to help the patient.

If you are offering a payment plan you must have a CARD ON FILE.

"Aetna is covering $600 of the total cost of your deep cleaning and fillings. Your out-of-cost expense would be $450 but remember if you save us time we save you money so if you stay today to get the SRP and fillings it will only cost you $150 for the cleaning and we will do your fillings for free. You can even split that payment up into 2 payments with a card on file. But, there is one catch... you must tell all of your friends and family how awesome we are here at Thrive."

It is very important to follow this script as patients will often come in for an exam and cleaning but did not expect to get fillings done. When you associate the cost to the cleanings the patient already knew they were likely coming in for cleaning so will pay the cost. They might as well stay as well because the fillings are free. Also, if they choose not to stay for the fillings, they will reschedule as the fillings are free.

As soon as the patient accepts treatment inform the back team what will be done today and get the consents. Everything must be done in a timely manner for a great patient experience.

If a patient absolutely cannot stay they must be rescheduled to keep those same deals. They should not be scheduled at prime time (Saturdays and before closing).

- Remember, if they want to keep the deal we presented for them as a same-day start they **must schedule and keep that appointment**.

Make sure to have the patient sign the treatment plan and scan it in the chart. It should be very clear what discounts were offered and that they are only good for today or if they preschedule.

Remember that even though a patient may not stay for same-day treatment it is not a total loss. If we are busy that may be for the best and if we treat the patients well they will come back.

Scheduled treatment always takes priority over same-day treatment but it is important to look at doctor time. Just because a crown is scheduled for 60 minutes does not mean the doctor will be in there the whole time. They are likely in the operatory for a maximum of 20 minutes total.

Treatment coordinator's main goal is to get treatment for the doctors and hygienists. You will be checking schedules, going over lists, etc to make the schedule productive. You are one of the only people who can discuss pricing with patients over the phone. It is important for you to follow up with patients and therefore not taking is important.

Another great resource is **practice analytics** as you can look up patients who have outstanding insurance benefits as well as treatment plans remaining.

E. End of Day Duties

- Make sure all treatment plans have been scanned and notated
- Make sure all patients who did not schedule have follow-ups planned
- Review charts for the following day and look over patients' insurance and treatment plans.
- Help with the front office to work on EOD.

SECTION 2 MISCELLANEOUS

A. Rules for the front desk position
    a. Front desk is NEVER left unattended during working hours.
    b. Front desk must be in uniform, makeup and hair done as if you were going out for a nice dinner. Remember you are the face of the office as you are the first person the patient sees.
    c. Front desk staff does not use phone, computers, tablets for personal use while at the front.
    d. Talking about other staff members or personal issues while at the front is not permitted. You would be surprised at how well your voice carries down the hall and into the operatories.

2. Verbal's/Scripts

Confirming Appointments

"Good Morning Mrs. Smith, thank you for returning my call. I have you confirmed for a new patient exam at 2 pm on _______ at our _______ (city) location. I can text you the link for our new patient paperwork. If you could fill this information out before your arrival that will speed up your check in process. Great, we look forward to seeing you Thursday at 2 pm."

Each office has a specific link for their paperwork therefore do not just direct them to our website as they will likely get confused and fill out paperwork that may go to the wrong office.

Cancellations

"***Mrs. Smith, is there any way I can help you keep that appointment today. Dr. ____ had that time reserved just for you. We can see you a little earlier or later to help accommodate your schedule."***

If a patient keeps the appointment, thank them and tell them you will see them shortly.

If the patient still cancels their appointment make sure to not give them any prime time appointments such as Saturdays, first thing in the morning, and the last few appointments of the day.

Notate in their commlog the cancellation reason and if it was less than a 24-hour notice.

Gently remind them of our cancellation policy and that they will be charged $35 as we require a 24-hour cancellation notice. If this is their first time let them know you will waive the charge one time as a courtesy but in reality, we will never charge the patient this fee.

Complimentary Whitening:

"The complimentary whitening includes custom trays and one whitening gel syringe. It should get you 1-2 shades whiter with 3 days or so of treatment. We recommend putting a tiny amount of gel into each tooth and wearing the trays for 45 minutes a day. If you are not sensitive you can leave them for up to one hour.
You can purchase additional whitening gel for $20 each or you can give us a five-star review on any platform such as Google, Bing, Yahoo, Facebook, Yelp, etc. and we will give an additional syringe for each review. 3 reviews will get you 3 additional syringes! (we max out at 3)
Also, you will get a new syringe at your next recall exam.
We take our customer service seriously so if anyone made your visit exceptionally good we would love for you to mention their name. Thank you and have a great day!"

Questions regarding billing

Most patients do not understand their EOB (explanation of benefits). It is very complicated and usually arrives at the patient's house 2 weeks before the office gets it. The EOB may not match up to what we have offered the patient and many times they will be paying a lot less than what their EOB states so the patient is confused.

Make sure to reference the treatment plan that was scanned into the patient's chart for all billing questions as they should be clearly marked.

If it is a question you cannot easily answer, have them direct the question to the manager.

If you do not know the answer do not make it up. Nothing is worse than you telling them something that is not correct and the manager having to reconcile any mistakes that were said.

Patient has pain after dental treatment

If the patient has pain after a dental treatment they can get upset. They do not understand the intricacies of treatment and that the teeth may be sore after we removed excessive cavities. You can offer a kind explanation and reassure them you will find a solution.

Remember whenever a patient is in pain show empathy and comfort them! Let them know you will help them find a solution and because you are not the treating dentist you may not have the solution but we can bring them in to have the doctor take a look at them.

> ***"Mrs. Smith I'm sorry you are having pain. Let's get you in to see Dr. ____ as she is an excellent doctor and I'm sure she can help find a solution. A lot of times it's something as simple as a bite adjustment but there is no way to tell for sure unless we see you. Are you available to come in today at ______?"***

This will work for the vast majority of patients. Something to keep in mind is that even the best doctors cannot really diagnose over the phone so they will need to see the patient. But, If the patient absolutely insists on talking to the doctor, inform the treating doctor and have them call the patient ASAP.

It is vital for us to treat these patients quickly as no one wants to be in pain and they associate the pain with our office. Make sure to notate the conversation in the CommLog.

MVP Patients

These are patients you call last minute to fill a broken appointment, last-minute openings, etc. You can pull these names from any number of lists (recall, broken appointments, pending treatment, etc.)

These patients are vital to filling up the schedule so we want to treat them like a true MVP.

We will offer them **$200 off their patient portion** if they can come in at the specific day and time you are trying to fill. You call these patients 1-2 days before the appointment to fill gaps in the schedule. You are NOT calling these patients a week or two in advance to fill the gaps in the schedule.

The whole idea of these patients is that they are helping fill last-minute gaps in the schedule so the doctor can be productive instead of sitting on their hands doing nothing.

> ***"Hi Mrs. Smith this is ______ from Thrive Dental in ______ (city). I'm calling to offer you a chance to be our MVP patient. If you could fill the opening I have at _______ we will give you a $200 credit towards your treatment. In order to receive this MVP offering you simply help us fill our schedule (Today or Tomorrow) in one of our short notice appointments."***

Overall scripts

If you do not have the answer to a patient's question do not make one up. Simply let the patient know you will find a solution and either get someone who can help them or take a message.

> ***"Mrs. Smith I am more than happy to help you. I want to get you the most accurate answer possible so I am going to place you on a brief hold while I transfer you to one of our specialists."***

Equipment Repair

Learn to do minor repairs by yourself or ask someone who has repaired/replaced it before. Most of the office supplies we get off Amazon or similar companies. It is a fix that is less than $200 ask your manager to replace/fix it.

Many issues can be repaired with a quick reset or small replacement.

Office Equipment

1. Try to fix the problem yourself
2. Check for warranties.
3. If you have tried resets, tightening bolts, changing batteries, unplugging and replugging in cords then call the appropriate person.
    a. Ben is our IT specialist for computer setups etc (we rarely need to call him)
    b. Each office has its own internet provider
    c. Mango is our phone and fax provider
4. In an emergency call Dr. Nate or Sam.
5. Anything under $200 confirm with your manager and replace the item.

Clinical Equipment

1. Once again try to fix it yourself as most issues are just a tightening of a loose bolt.
2. Inform the regional RDA of the issue if you cannot fix it.
    a. They will call southwest or the appropriate company
3. In an emergency call Dr. Nate or Sam.
4. Anything under $200 confirm with your manager and pay it with the office credit card.
    a. Keep all quotes/receipts.

THRIVE EXPERIENCE

Thrive is the STANDARD of Dentistry in Texas

We do EVERYTHING in our power to remove dental fear and anxiety.
We go above and beyond to deliver an OUTSTANDING dental experience.

01

Front Area Presentation

1. Always have the diffusers going with at least **20 drops** of Peppermint oil. Clean diffusers daily.
2. Keep front desk area extremely tidy and **free from clutter**. No personal items out.
3. Keep entire office extremely clean, tidy, and stocked.

02

Patient walks in

1. Stand up, smile, and greet patient by **name** and say, *"Hi, (Name)! Welcome to Thrive!"*
2. Greet the children - from the youngest to the oldest, ask them their names and ages. Take kids straight to the treasure chest when they arrive.
3. Give patient a New Patient goody bag and tell them the contents of the bag: *"Thank you for choosing Thrive! This is our gift to you. Here is a booklet that Dr. Christine made for you. You get a FREE Thrive Electric Toothbrush! You also get a Gift Card for $200 Off Zoom Whitening!"*
4. Reassure your patients. Play up your doctor and team: *"You will love Dr._______ (name) and our team! You are in the best of hands!"* (Always use the **names** of the team and patients).
5. Offer a beverage while they wait: *"Please help yourself to water or coffee."*

03

RDA

1. Calls patient by **name** - smiles and greets them.
2. Offers to take their purse or jacket to set it on the side chair.
3. Offers blanket, pillow, headphones, sunglasses, and show to watch.
4. Tell them *"Dr. _______ will be here shortly. You will love him/her!"*
5. Find out **one key personal fact** and write it down in upper left box of patient chart.
6. Find out patient's **chief complaint**. Take notes for any questions that the patient has and let the doctor know.
7. RDA tells doctor the patient's **name**, **one key personal fact,** and their **chief complaint.**
8. Have patient watch the **New Patient Welcome Video** and say, *"Here is a welcome message to you from our owners, Drs. Christine & Nathan."* (see Script for free whitening).
9. Have **patient's chart open** for the doctor to see.
10. **Take detailed notes for the doctor** of all that is discussed with the patient throughout the visit. You are the doctor's scribe.

04 Doctor enters

1. Enters room, *"Hi, (patient's name)! It's so nice to meet you! Thank you for choosing Thrive! We're going to take amazing care of you!"*
2. Doctor repeats what the RDA reported to them: **one key personal fact, chief complaint**
3. Take a couple minutes to get to know the patient as a person and answer their questions. Show empathy, warmth, and confidence.
4. **RDA** - documents all that was discussed by patient and doctor.
5. Doctor presents tx plan - shows the **intra-oral photos.**
6. Doctor plays up tx coordinator, *"Our manager, _________ (name), is coming in to help you get the most out of your benefits. You will love her! She's going to take amazing care of you."*
7. **RDA** plays **dental educational videos (**Bite Bank) pertaining to any **major dental procedures** planned by doctor. ie) tooth loss, implant, bone graft.

05 Tx Coordinator (see scripts)

Asks patients for reviews and referrals for more discounts and $100 for every patient they refer.

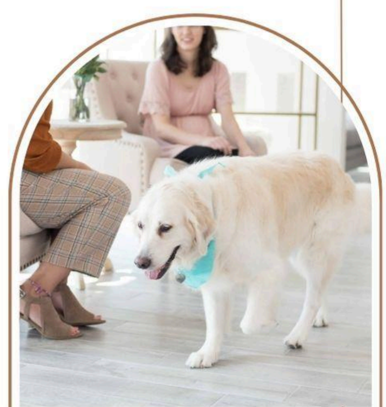
06 During & After Treatment

Doc and team are extremely attentive to make sure patient is always comfortable. Treat patient like they're they're the only patient there. RDA brings patient a warm towel on plate, and says, *"Here is a warm, lavender-infused towel to wipe your face."* (Don't just offer it. Bring it.)

07 Hand-off

RDA brings patient to the front and **hands off** to check-out team member, addressing the patient by name and telling check-out exactly all that was completed, and what we're doing at the next visit, and when.

08 Check Out



Thank patient for choosing Thrive.
During check-out, set aside the **New Patient Thank You Card** to send out **same day**.

09 New Patient Visit Follow Up

1. Write a hand-written New Patient Thank You Card to send out that day.
2. Call patient the **next day:** *"on behalf of Dr.______ and our team, thank you so much for joining our Thrive family! We're so grateful you chose us as your new dental home! We will take amazing care of you! We are always here for you if you need anything."*
3. If patient doesn't answer, leave a **voicemail** and then follow up with a **text message** saying the same thing.