



THRIVE
DENTAL & ORTHODONTICS

SCRIPTS

CONFIRMATIONS:

“Good morning/afternoon Mrs./Mr. Smith this is _____ from Thrive Dental. I am calling to confirm your appointment for 11 am on Tuesday in (Office location) for your new patient exam. Please call our office as soon as you get this to confirm your appointment as we require a verbal confirmation to keep your appointment on the schedule.

Thank you and we look forward to hearing from you.”

Notate in the CommLog that you attempted to contact the patient, what number you called, and your initials.

Patient calls to confirm

“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.”

Removal from Schedule Call

If the patient does not confirm their appointment by 12 pm for the next day we must break the appointment and move it down off the schedule.

“Good afternoon Mrs. Smith, this is _____ from Thrive Dental. We have not been able to contact you regarding your appointment for tomorrow therefore we will be taking you off the schedule to give your appointment to someone on our waiting list. Please call us back to schedule a new time that works better for you. Thank you and have a great day!”

Cancellation Verbiage

When a patient calls to cancel you must first, place them on hold to read through all commlog notes and see how many times they have cancelled in the past (if any).

First Cancellation:

“Mr. / Mrs. Patient, is there any way I can help you keep your appointment for today? We did have (amount of time) reserved on our schedule just for you. We can see you a little bit later / earlier to help accommodate for your situation”

- If the patient keeps their appointment let them know that we appreciate them. “Mr Patient, thanks so much for keeping your appointment today. We look forward to seeing you shortly!”
- If the patient still cancels: **DO NOT** give them another prime time spot (prime time = first thing in the morning, in the late afternoon or a Saturday). Schedule them wherever you need spots filled (TODAY OR TOMORROW) and **ALWAYS** note their cancellations and their reasons for cancelling in the commlogs. ie:

Second Cancellation:

Ask them to hold and read through their commlogs

“I see this is your second time that you haven’t been able to make your appointment. We do try our best to try and schedule Dr Fazal’s time very strategically because we do have a lot of patients wanting to get in to see her. Is there no way that you can make it to this appointment?” they say no, you say “okay well we understand” schedule them three weeks out.

Third Cancellation:

Place them on hold, read through history, bring them back on the line and say:

“Gosh I hate to hear that you won’t be able to make your appointment today, Mrs Patient. I do see here that this has happened a few times in the past and I understand how busy your schedule must be. How about we go ahead and place you on our VIP priority list which is that any pt that has to make a last minute schedule change like you have this morning, we put them on our VIP list and if we have any last minute openings we can reach out to you and call you and see if you’d be available that same day if it would work with your schedule! How does that sound to you?”

GREETING THE PATIENT:

Initial Greeting of the patient:

“Good morning/afternoon and welcome to Thrive.

How are you doing today? I love your shoes (jacket, purse, socks, glasses, etc).

May I have your last name?

Great, I see your appointment is for a new patient exam at 10 am, May I have your ID and insurance card?

Thank you Mr/Mrs. Smith. You can fill out your new patient paperwork on our laptop located to your right.

Can I offer you bottled water while you wait?”

No Scheduled Appointment:

“Mr/Mrs. Smith, it appears that your appointment was for our Frisco location was actually tomorrow at 3 pm but this is not a problem and we will get you seated as soon as possible.”

Patient Not Confirmed:

“Good morning/afternoon Mrs. Smith can I verify your phone number and email. It looks like you have an appointment at 10 am today. I also wanted to remind you that we require verbal or text confirmation that you will be attending your appointment so we can have adequate time for all of our patients.”

After the paperwork is completed, remind the patient they will be taken care of shortly and take a picture for their chart. The picture allows us to easily identify the patient at their next visit.

“Thank you for completing your paperwork Mrs. Smith. Do you mind if I take a picture for your patient profile?”

If the patient does not want to take a picture that is not an issue. Mark the patient's file and let them know someone will be with them shortly.

Mark the patient as **READY** and announce over the ear that the patient is ready and what they are going back for.

“Mrs. Smith is ready to go back for her FMX and new patient exam”

Existing Patient:

“Good morning and welcome to Thrive. May I have your last name?”
(ideally, you will become familiar with patients names)

“It’s great to see you again Mrs. Smith. How is your morning going?”
“Would you like your receipt now or when you check out?”

Take care of any copays or fees that need to be collected. If they are here for treatment then make sure they sign consents.

“Mrs. Smith is ready to be seated for her upper right fillings. Her consents have been signed.”

Patient Dismissal

Checkout receives patients from an escort which is usually an assistant or treatment coordinator. Remember, you are the last person they see therefore you are vital to the patient experience.

- Always greet patients with a smile, eye contact, and a pleasant attitude.
- Patients may be numb and eager to leave therefore being organized is crucial for maximum patient satisfaction.
- You must make sure the patient fully understands what their appointment was for and the associated charges.
 - When taking payment refer to the treatment plan and highlight/circle if necessary. Patients must know exactly what they are paying for.
- If needed referrals and prescriptions will be given at this time.
- Always thank the patient for coming into the office and remind them of our referral program.

“Hello Mrs. Smith I can get you all checked out.

I see we did your exam, cleaning, and right-side fillings today.

It looks like your copay will be \$____ (point to the treatment plan). Would you like to make that payment with cash or card?”

“We will also need to see you back in ____ months for your follow-up hygiene appointment. Our system automatically set you an appointment for ____ at ____ pm/am. You will receive a reminder as the appointment gets closer and if that time does not work out for you just give us a call to change the appointment”

If the patient has pending treatment and benefits remain then:

“Mrs. Smith it also looks like you have 3 fillings on your lower right side. We have a few openings for next week that I can put you down for.”

If the patient is maxed out, schedule them for their follow-up the next year with pending treatment and cleaning together. Schedule them in the ghost column if it's 6 months out.

“Mrs. Smith, thank you so much for coming in to Thrive today. You were a perfect patient. We would love for you to refer your friends, family, and coworkers who are just like you.”

If a patient is being referred out

“Mrs. Smith, it looks like we need to refer you out to _____ for that tooth number _____. I have the referral information right here.

Make sure the **HIPAA release** form is signed and the **referral form** is filled out and scanned into the patient's chart.

Avoid all OPEN-ENDED QUESTIONS as these can backfire on you. Patients are likely tired, sore, and want to get on with their lives. If you ask “Did you enjoy everything?” the patient may start complaining. Simply thank them and ask for a referral/review.

“We always strive for a 5-star experience. Did we deliver that today?”

Recall/Perio Maintenance:

Let the patient know their next recall appointment has already been pre-booked and we can modify the exact time as the appointment approaches. Do not ask the patient if we can book their next appointment. **All patients must leave with a recall appointment pre-scheduled.**

“Mrs. Smith you will be due for your next hygiene appointment in 6 months. This brings us to October. Our system already booked you for October 2nd at 12 pm. As the appointment gets closer you will get reminders and we can modify the appointment as necessary. Thank you for coming into Thrive and have a wonderful day.”

Scheduling Treatment:

“Mrs. Smith, today we took care of your comprehensive exam and Xrays. You have two fillings on your upper left side. Your insurance is estimated to pay \$____ and your out of pocket would only be \$____. I have a few openings next week. Can I save one of them for you?”

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!”

The patient has pain after dental treatment

“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 _____?”

TREATMENT COORDINATOR

“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?

“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”

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”***.

“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.”