



# THRIVE

DENTAL & ORTHODONTICS

## Training Manual Check-In and Out

*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 a 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 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 1/ CHECK-IN**

### **A. Job Description**

Chair 1 is the face of Thrive. You are the first person people see when they come into Thrive and it's true what they say that "first impressions are everything". Chair 1 has a primary job of greeting patients, taking copays, and creating a Wow environment for our amazing patients. You will also be responsible for patient intake forms, taking patient pictures, guiding patients to the lobby, and ensuring patients do not wait too long for their appointments.

### **B. Opening Duties**

**Checklists for Chairs 1,2,3 and 4 are a shared responsibility.**

- Clock in
- The lobby is clean and presentable
- Plants are watered
- The laptop is open and set to "kiosk" mode.
- Music is playing at an appropriate level and the approved playlist
- New patient paperwork is stocked
- Informed Consent paperwork is ready for all treatment coming in that day
- All copays are notated in the charts for that day
- Review the schedule so you can go over any openings that can be filled for today and tomorrow

#### **Mid-Day Duties:**

- Restock Restroom
- Clean Lobby
- Confirmation calls are all completed
- Patient paperwork, consents, copays are all ready for tomorrow.

### **C. Time Management**

Every morning you must look at the schedule and identify any areas where there are openings. Our goal is to have every seat occupied as we want our doctors and hygienists to have patients to treat. If there are openings we must call our ASAP (MVP) list.

If a patient is 5 minutes late you must contact them via phone and text. Notate in patients COMMLOG any issues with patients arrival. It is essential to notate all communications with patients as this helps us understand if someone is chronically late.

**Do not delete any appointments.** You must BREAK the appointment (will show up on our broken appointments list) if the patient no-shows. If a patient cancels/no shows on a Saturday or

any appointment after 4 pm this must be notated as we should no longer offer prime times (first thing in the morning, just before closing and Saturdays) for patients who do not want to notify us if they cannot make it in.

Communication Item - Saved: 12/03/2021 12:47:56 PM

Patient: Nathan Coughlin User: Dr. Nathan

Date / Time: 12/03/2021 12:46 PM

Type: ApptRelated Insurance Financial Recall Misc FHIR

Mode: None Email Mail Phone InPerson Text EmailAndText

Sent or Received: Neither Sent Received

Note: Patient no show no called for 1 pm appt on a Saturday. Called and texted phone number 123 456 7890. NC

Buttons: Auto Note, Clear, Delete, OK, Cancel

- Monitor the waiting room at all times. Patients should not wait more than 5 minutes for their appointment. Chair 1 is continuously aware of the waiting room and if waiting times are longer than normal.

## D. Patient Introduction/Greeting

- When a patient arrives in the office you must STAND and greet them. Make eye contact and have a smile. Remember you are creating the first impression.
- Change appointment status to “Here” as soon as the patient arrives. (**See Appointment Status**)
- If you know their name and they are a recurring patient make sure to talk to them politely and **COMPLIMENT** them on their appearance, shoes, dress, smile, or anything you find appropriate.

## **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?”***

If the patient DOES NOT have a scheduled appointment or did not confirm DO NOT MAKE A BIG DEAL OUT OF IT and act professionally. Always approach with kindness and love according to our **Thrive values**.

If the patient does NOT HAVE A SCHEDULED APPOINTMENT this is most likely OUR FAULT. Take care of this issue in a discreet manner.

1. Check all other locations to make sure the patient is in the correct office.
2. Name search current office to make sure the patient is in on the correct day.
3. Do not make the patient feel uncomfortable or unwelcome. Proceed with offering new patient paperwork, ask for their ID, Insurance card, and take a photo as per usual. Get insurance verification started ASAP by the Insurance verification specialist (chair 4)

### **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:**

As per usual do not make the patient feel uncomfortable as we may have misspelled their email or written down the wrong phone number.

Verify email and phone number and remind the patient that we require a verbal or text confirmation to maintain their appointment.

***“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.”***

Scan all forms into the patient's chart.

## **E. Communication**

Communication is vital for an office to function properly. Without proper communication, things will get missed and the patients will have a poor experience. **All staff** needs to wear earpieces or else communication will falter.

- Make contact with the patient every 5 minutes. This lets patients know they have not been forgotten. You can either offer them water, compliment them, talk about the weather, etc.
- Over the earpieces let the back staff know that the patient is **“ready to go back”**. You should get a response but you do not ask again in 2 minutes. If you have asked **twice**



and there is still no response ask “**Do you need me to bring the patient back to a room?**”. If the back staff is busy, it is the responsibility of the front to seat the patient. Limit waiting time in the lobby for patients.

- All patients on a “time crunch” should be notated and taken care of promptly.
- Avoid conflicts with patients at all times. If there is an issue that cannot easily be handled by you, ask your manager to help with the issue. We do not want loud unprofessional conversations to occur in the lobby. If needed, bring the patient into a consultation room to aid in solving their problem.

## F. Processing/Entering paperwork

- Most **New Patient Forms** (paperwork) should be filed electronically. This speeds up the process of entering paperwork.
- Online paperwork can be filled out at the **Kiosk laptop** at the office or **online**. The online forms are **SPECIFIC TO EACH OFFICE** so be sure to direct the patient to the correct website for the office that they will be attending.

The screenshot shows a medical software interface. At the top, there is a menu bar with options like Lists, Reports, Tools, eServices, Alerts (0), and Help. Below this is a toolbar with various icons and buttons, including 'Add', 'Delete', 'Set Guarantor', 'Move', 'Clones', 'Add', 'Synch', 'Break', 'Add Insurance', and 'Discount Plan'. The main window displays a 'Family Members' table with columns for Name, Position, Gender, Status, Age, Recall Due, Type, Due Date, and Sched Date. The first row shows 'Coughlin, nathan' as a 'Single' patient. Below this, there is a 'Patient Information' section with fields for Name, Gender, Status, Date of Birth, and Address. To the right, a 'Patient Forms' window is open, showing a table with columns for Date, Time, Kiosk, Description, and Image Category. The table lists several forms, including '1.DENTAL XRAYS', '2.FINANCIAL AGREEMENT', '3.HIPAA', '5.WHAT TO EXPECT INITIAL VISIT', '6.INSURANCE/REGISTRATION FORM', and '7.MED HX NEW PT'. A red circle highlights this table, and a red arrow points to the 'Forms' menu item in the top toolbar.

Date	Time	Kiosk	Description	Image Category
11/30/2018	12:07p		1.DENTAL XRAYS	
11/30/2018	12:07p		2.FINANCIAL AGREEMENT	
11/30/2018	12:07p		3.HIPAA	
11/30/2018	12:07p		5.WHAT TO EXPECT INITIAL VISIT	
11/30/2018	12:07p		6.INSURANCE/REGISTRATION FORM	
11/30/2018	12:07p		7.MED HX NEW PT	

- Mark patients as **READY** as soon as they have filled out the paperwork and all payments have been completed. There is no need to wait until you have finished entering all information as this can be done while the patient is waiting.
- To enter patients' date of birth, SSN, email, phone number, address, etc. click on the “Family” module and then double click the “Patient Information” area. An “Edit Patient Information” section will appear where you can fill out all necessary information.

**Family Members**

Name	Position	Gender	Status	Age	Recall Due	Type	Due Date	Sched Date
Coughlin, nathan	Single	Male	Single	21				

**Patient Information**

Last	Coughlin
First	nathan
Middle	
Preferred	
Title	
Salutation	
Status	Patient
Gender	Male
Position	Single
Birthdate	05/05/2000
Age	21
SSN	xxxx2222
Address	63561 Eldora
Address2	
City	McKinney
State	TX
Zip	75070
Hm Phone	
Wk Phone	
Wireless Ph	2222222222
E-mail	nathan@gmail.com
Contact Method	WirelessPh
ABCO	
Billing Type	Standard Account
Primary Provider	VU- Nguyen, Manhuu
Sec. Provider	None
Payor Types	None
Language	None
Referrals	None
Ortho Exam	
Treatment Plan	
Hobbies/Referrals	
CareCredit Pre-Approval Status	
Pat Restrictions	None
ICE Name	Vu
ICE Phone	3333333333

**Family Relationships**

Status	Gender	Position	Family Relationships
Patient	Male	Single	
NonPatient	Female	Married	
Inactive	Unknown	Child	
Archived		Widowed	
Deceased		Divorced	

**Address and Phone**

Appointment scheduling is restricted

Patient Number: 1297

Last Name: Coughlin

First Name: nathan

Preferred Name, Middle Initial:

Title (Mr., Ms.):

Salutation (Dear ...):

Address and Phone: ☒ Same for entire family

Home Phone: (222)222-2222

Address: 63561 Eldora

Address2:

City: McKinney

ST: TX

Zip: 75070

Address and Phone Notes: ☒ Same for entire family

Billing and Provider(s): ☒ Same for entire family

Credit Type:

Billing Type: Standard Account

Primary Provider: VU

Secondary Provider: None

Fee Schedule (rarely used): None

Public Health: Other Emergency Contact\*

Race:

Ethnicity:

County:

Site (or Grade School):

Grade Level: Unknown

Treatment Urgency: Unknown

Responsible Party:

Sexual Orientation:

Gender Identity:

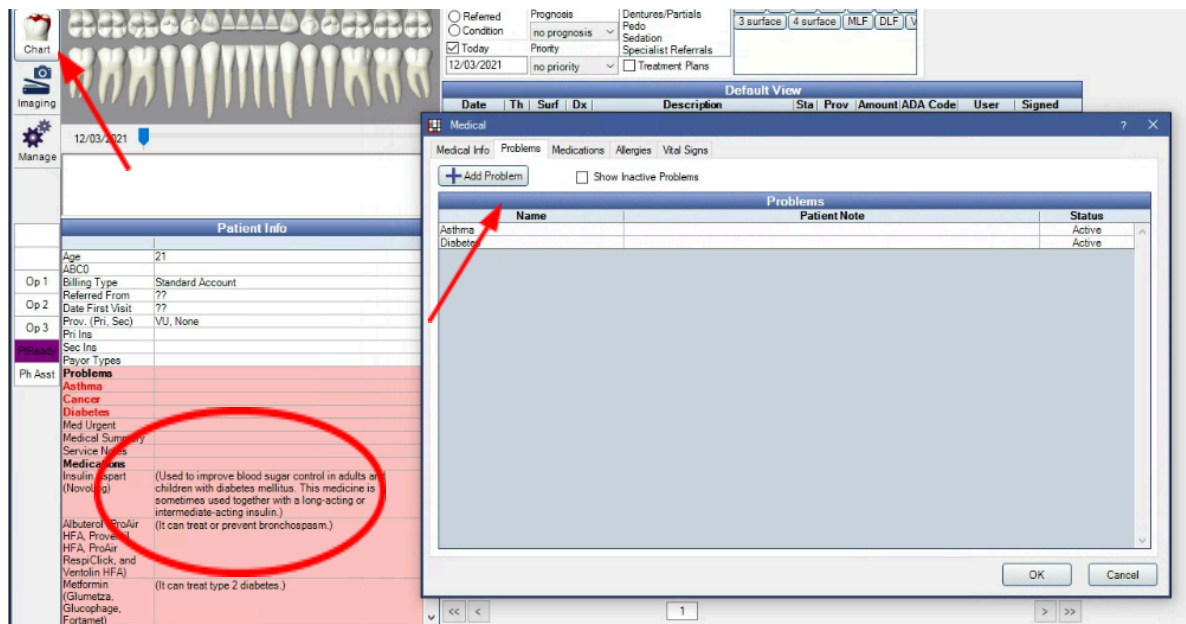
\* Indicates Required Field

OK Cancel

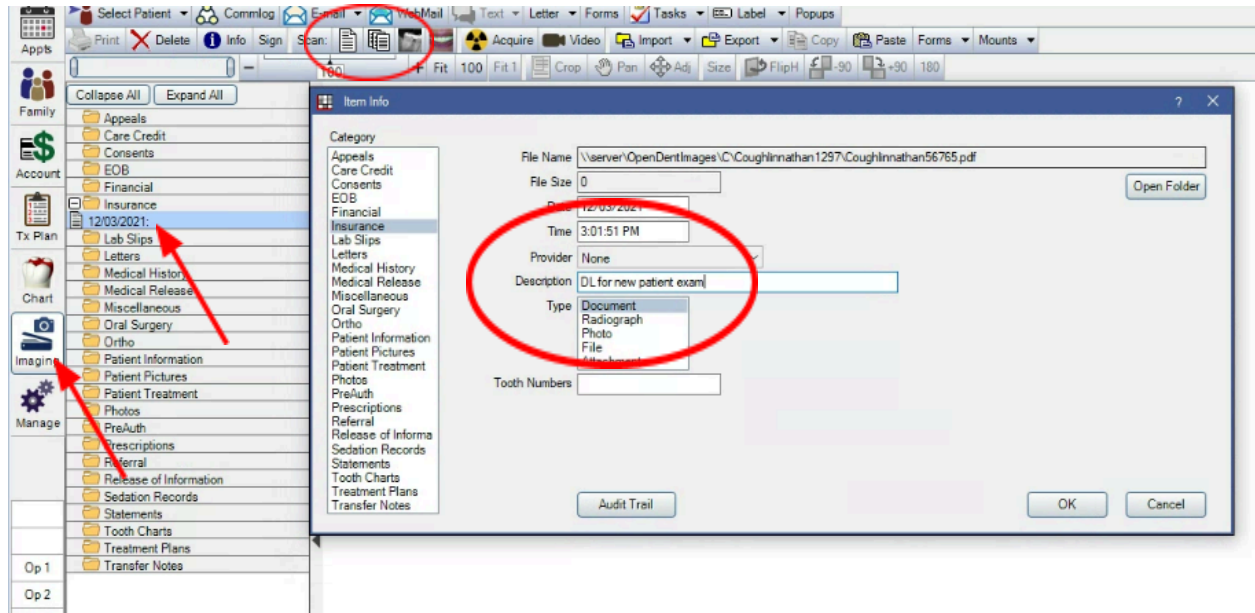
- Enter "Referred From" whether it was an existing patient, drive-by, google, Facebook, etc. This is important information as it allows us to know if our marketing is working. If more than one of these applies to you which one **"made you take action"** to come into the office.

Many medications and health issues will auto-populate but not all of them. Click on the patient's "Chart" and evaluate the areas in red to make sure all medications and health issues are notated.

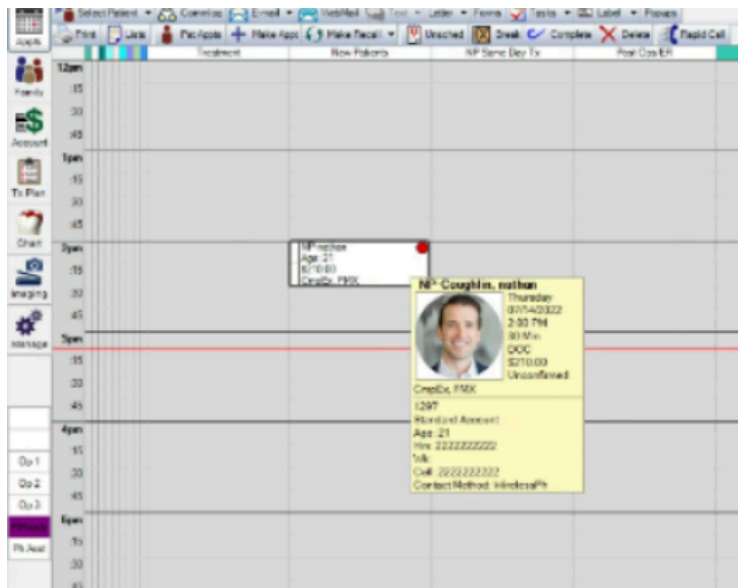
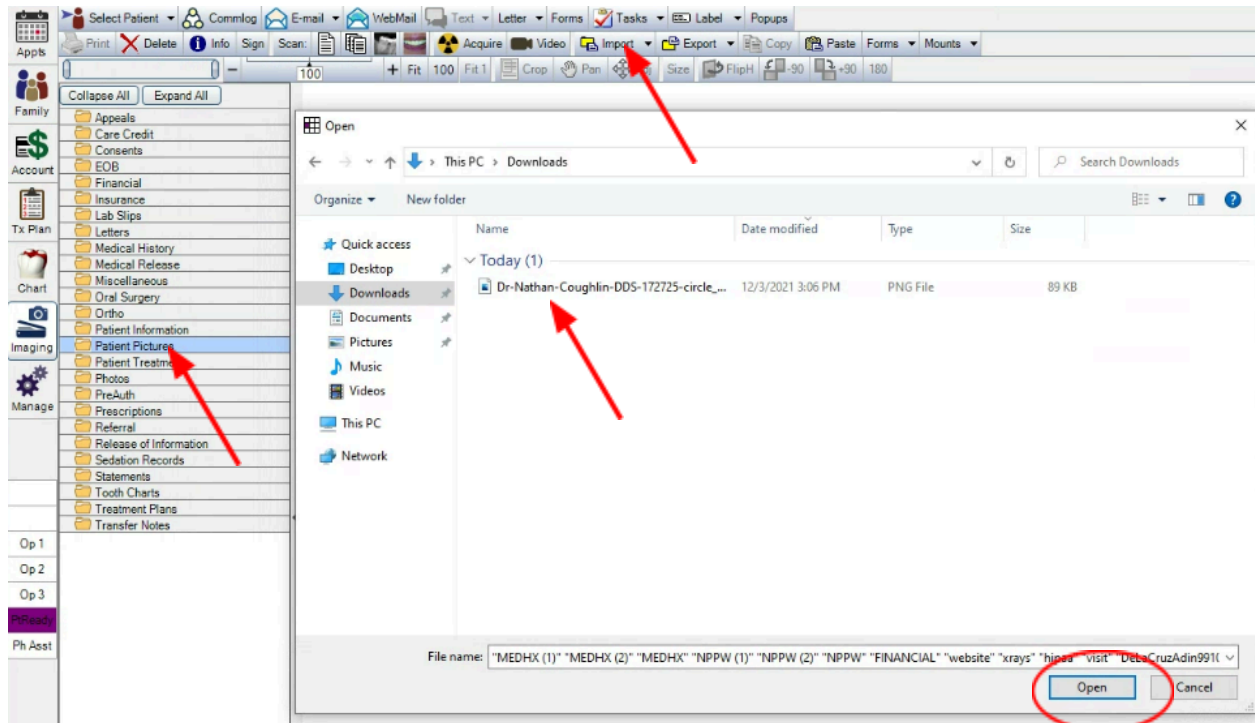
- To add a medication or health condition, double click the red area and "+ Add Problem" button.



- All new patients' IDs/Drivers' License, Insurance cards, and paperwork must be scanned into the charts in the "Imaging" module.
- To scan paperwork click on "Imaging" and then the folder you want the image to go into.
  - Once the folder is selected click on the multi-paper icon.
  - The scanned document will pop up. Add a clear Description so the file is easily distinguished.



- To add a patient profile picture, click on the "Imaging" module and then "import". This will allow you to import an image you have saved on your computer.
- Import the image to the "Patient Pictures" folder.
- Once completed the image will show up every time you hover of that particular patients appointment.



- If a patient DENIES a photo, make sure to save an image in the “Patient Pictures” area that states “Patient Denied Photo” so we do not continuously ask the patient the same questions.

## G. Payments

Our payment guidelines are as follows:

- Personal checks are not accepted

- Cash/money orders are to be stored in the safe and the managers be notified immediately.
- If a patient pays with **CASH**, immediately print a receipt, scan it into the chart and give it to the patient.
- Credit card payments are run through XCharge.
- Care Credit (Up to 12 months interest-free) is run through CareCredit.com and is specific to each location.

## **CASH PAYMENTS**

- Select all procedures that will be linked to the cash payment
- If procedures have not been completed (taking payment before the patient goes to the back) then just select payment without selecting any specific procedures.
- Enter the amount and push "OK"
- If the payment is less than the total amount owed then just select payment without selecting any specific procedures.

The screenshot shows a dental software interface. The 'Payment' menu is highlighted in the top navigation bar. A dialog box titled 'Please enter an amount:' is open, with the value '50' entered in the input field. The background shows a 'Payment Plans' table and a 'Patient Account' table.

Date	Guarantor	Patient	Typ	Category	Principal	Total Cost	Paid	PrincPaid	Balance	Due Now
12/04/2021	Test, Test	Test, Test	PP	None	2,370.00	2,370.00	0.00	0.00	2,370.00	399.00
12/04/2021	Test, Test	Test, Test	Ins	None	2,000.00	2,000.00	0.00	0.00	2,000.00	0.00

Date	Patient	Description	Charges	Credits	Balance
04/02/2019	Test	DL resin-based composite - two surfaces, anterior (unsent)	0.00		0.00
04/02/2019	Test	OD resin-based composite - two surfaces, posterior (unsent)	0.00		0.00
04/02/2019	Test	pulp cap - indirect (excluding final restoration) (unsent)	0.00		0.00
06/27/2019	Test	Statement-InPerson			
09/14/2019	Test	periodic oral evaluation - established patient (unsent)	0.00		0.00
03/14/2020	Test	prophylaxis - adult (unsent)	0.00		0.00
03/14/2020	Test	periodic oral evaluation - established patient (unsent)	0.00		0.00
03/14/2020	Test	prophylaxis - adult (unsent)	0.00		0.00
03/14/2020	Test	V resin-based composite - one surface, posterior (unsent)	0.00		0.00
03/14/2020	Test	V resin-based composite - one surface, anterior (unsent)	0.00		0.00
12/04/2021	Test	comprehensive orthodontic treatment of the adolescent dentition (unsent)	4,370.00		4,370.00

- Under Payment type select "Cash"
- In the notes section be sure to indicate what teeth or procedures this payment is for and initial. Finalize transaction by pushing OK.



Payment

Paid By: Test Test

Entry Date: 12/04/2021

Payment Date: 12/04/2021

Amount: 50.00

Check #:

Bank-Branch:

Note: Forteth #3, #4, #5 and UR SRP. NC

Hide Splits ▼

Payment Type

☐ None (Income Transfer)

Credit Card

Cash

Care Credit

CC Auto NetPymnt

HSA/FSA Card

X-Charge Auto-Draf

Insurance check

Filtering

**You must print out a statement for the patient if they are paying in cash.**

- Left-click the dropdown arrow next to "Statement" and select "More options"
- Be sure to select today's date only, select "Hide payment options" and "Single patient only" and then print the statement for the patient.

Help

Text ▼ Letter ▼ Forms ☒ Tasks ▼ Label ▼ Popups Dexis VixWinNu

Installment Plan Quick Procs ▼ Statement ▼ DXC Patient Credit Score

-InsEst =Est Bal Pat Es

0.00 -50.00 -50

nt Plans

ncipal	Total Cost	Paid	PrincPa
3,370.00	2,370.00	0.00	0.0
2,000.00	2,000.00	0.00	0.0

Walkout

Email

Receipt

Invoice

Limited

Limited (Custom)

More Options

Ser

Cre

Se

Patie

Statement

Date: 12/04/2021

Sent: ☐

Mode: Mail, InPerson, Email, Electronic

Date Range: Start Date: 12/04/2021, End Date: 12/04/2021, Today, Last 90 Days, Last 45 Days, All Dates

☐ Show all transactions since family zero balance

Hide payment options: ☒

Single patient only: ☒

Intermingle family members: ☒

Include patient last name: ☐

Receipt: ☐

Sent text: ☐

Note: [Text Area]

Bold Note: [Text Area]

Buttons: Delete, Print, E-mail, Pat Portal, View, OK, Cancel

## **CREDIT CARD PAYMENTS**

- Credit card payments are processed via Xcharge.
- XCharge is linked to Open Dental and therefore many of the transactions will automatically show in a patient's account.
- If the payment is occurring AFTER the treatment is done select the treatment that payment is going towards.
- If the payment is being received BEFORE the treatment has been completed then you do not need to select the exact procedure payment is going towards.
- No matter the transaction, make sure to leave a detailed note about what the transaction is for.

Log Off File Setup Lists Reports Tools eServices Alerts (0) Help

Select Patient Commlog E-mail WebMail Text Letter Forms

Payment Adjustment New Claim Payment Plan Installment Plan Quick

Family Aging 0-30 31-60 61-90 over 90 Total -InsEst =Est Bal

0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00

Patient Account Auto Ortho

Date Description

10/14/2017 Test due regeneration - resorbable barrier, pe

10/14/2017 Test erupted tooth requiring removal of bone

10/14/2017 Test oning of tooth, and including elevation

03/12/2019 Test osteal flap if indicated (unsent)

03/12/2019 Test cement graft for ridge preservation - pe

03/12/2019 Test osive oral evaluation - new or

04/02/2019 Test established patient (unsent)

04/02/2019 Test prophylaxis - adult (unsent)

04/02/2019 Test ML resin-based composite - two surfaces, anterior

04/02/2019 Test (unsent)

04/02/2019 Test DL resin-based composite - two surfaces, anterior

04/02/2019 Test (unsent)

04/02/2019 Test OD resin-based composite - two surfaces, posterio

Please enter an amount:

1

OK Cancel

If you have ran a payment with this patient previously you will be able to access the card here.

Payment

Paid By Test Test

Entry Date 12/04/2021

Payment Date 12/04/2021

Amount 1.00

Check #

Bank/Branch

Note

Hide Splits

X-Charge Transaction Types

Transaction Type

Purchase

Return

Debit Purchase

Debit Return

Force

Pre-Authorization

Adjustment

Void

Save Token

Prompt for Signature

Print Receipt

OK

CareCredit

CHARGE

Credit Card

New Card

Apply to Recurring Charge

From/To Dates: 10/14/2017 12/ 4/2021

Proc Codes:

Refresh

Outstanding

Treat Plan

Show Only Allocated Credits

Show All Charges

Current Payment Splits

Date	Prov	Patient	Code	Type	Amount
------	------	---------	------	------	--------

Outstanding Charges

Date	Patient	Prov	Code	Tth	Type	AmtOrig	AmtEnd
------	---------	------	------	-----	------	---------	--------

Delete Splits Delete All Add Split

Total 0.00

Pay Add Partial

Group By None

Total 0.00

OK Cancel



Prepay

Care Credit  
CC Auth.NetPymn  
HSA/FSA Card  
X-Charge Auto-Dr  
Insurance check

XCharge 8.2 Release 5 - Breckinridg...

File Transaction Help

Receipt Clear

Credit Card - Purchase

Amount 1.00

Credit Card # -- USE PIN PAD DEVICE --

Expiration (MMYY)

\* ZIP Code 75082

\* Address 2333 BLAH

\* CVV2/CVC2

\* Receipt # PAT1

\* Clerk ID Stephanie Mancilla

[F12] Process

- If the card is not physically present you MUST HAVE THE PATIENT SIGN a printed copy of the receipt.
- You can use the pin pad or manually enter the card number on the XCharge screen shown above.

Payment

Paid By Test Test

Entry Date 12/04/2021

Payment Date 12/04/2021

Amount 1.00 Prepay

Check #

Bank-Branch

Note

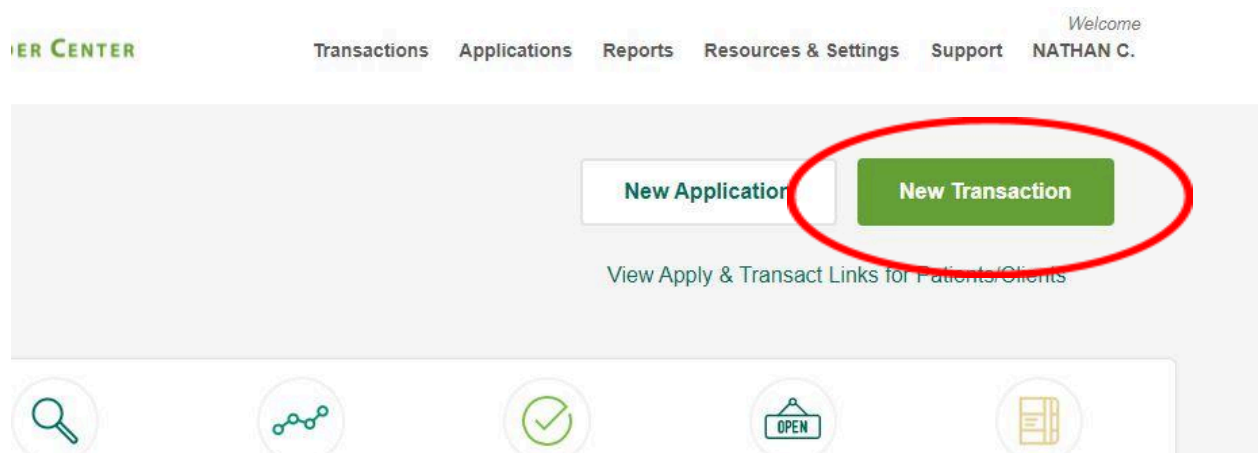
RESULT=SUCCESS  
TYPE=Purchase  
APPROVALCODE=00835I  
NAME=COUGHLIN/CHRISTINE  
CLERK=Stephanie Mancilla  
XCACCOUNTID=XAWrwDGWYEXal

Hide Splits

- Initially, all of the credit card information will populate in the "Note" section.
- Delete all of the notes except for the "RESULT=SUCCESS" and the "ACCOUNT" number. This will allow for easy access if a patient asks what credit card was used for that transaction.
  - In the notes section add what the transaction was for and your initials.





## CARE CREDIT

- Care Credit is a third-party provider used for financing. Patients are able to sign up for this medical credit card via CareCredit.com.
- Care Credit has a 3 day grace period therefore if a patient signs up the same day and we charge them they can potentially dispute the charge. Use your best judgment but typically we will allow a patient to sign up and use CareCredit the same day unless it is a very large payment of over \$5000.
- Once they have been approved, or if they currently have a CareCredit card, we can use this for any of our transactions **except recurring payments**.
- To take a CareCredit payment you must go to the CareCredit portal and login. The logins are specific to each office.
  - <https://www.carecreditprovidercenter.com/portal/login>
- Find the patient's information and charge their account.



## Process Transaction

### TRANSACTION TYPE

 Purchase	 Refund	 Authorization Only	 Forced Purchase
---	---	--	--

### PURCHASE METHOD

<b>Submit a Purchase Transaction Now</b> Start and complete a purchase transaction for a patient/client.
<b>Send Purchase Transaction to Device ⓘ</b> Start a purchase transaction for a patient/client to complete on their device or your patient-facing in-office device.

### ACCOUNT NUMBER

 LOOK UP ACCOUNT

- “ACCOUNT NUMBER” is the patient’s CareCredit card number with no spaces.

<b>TRANSACTION TYPE</b> <b>Purchase</b>	<b>ACCOUNT NUMBER</b> .....7595
--	------------------------------------

**AMOUNT**

\$ 1500

**NAME(S) ON ACCOUNT**  
CHELSEA TONNON

If the person presenting the card is not listed above, please call 800-859-9975 to verify they are authorized to use the account.

<b>PROGRAM NAME</b>	<b>MANUFACTURER</b>
Clear Aligner ▼	Invisalign ▼

**TRAN/PROMO CODE**  [Promo Lookup](#)

Deferred/No Interest if Paid in Full
<b>206</b> 6 Month Deferred/No Interest if Paid in Full
<b>212</b> 12 Month Deferred/No Interest if Paid in Full

Change promotions offered through [Resources & Settings > Manage Promotions](#).

- Make sure to Indicate the PROGRAM NAME as “Clear Aligner” and the MANUFACTURER as “Invisalign”.
- Choose the PROMO CODE that is available to the patient. Typically this will be either 6 or 12 months no interest if the payment amount is high enough.
- Once the transaction has been processed you must print out a receipt and have the patient sign.
- Scan the receipt into the patient's chart and give them the original receipt.
- You now must go back to Open Dental and enter in the payment information as **Open Dental and Care Credit are not linked**.

- As always, enter what the payment was for, your initials, and the last 4 numbers of the CareCredit credit card number.

## H. Payment Plans

Be familiar with payment plans as we use this often for orthodontics and more extensive treatments.

These are used for any treatment that requires greater than 2 payments. This includes patient payments and insurance payments.

### Patient Payment Plans Entry Into Open Dental

- Patient payment plans are typically used for orthodontic treatment and rarely for general dental treatment.
- After you create a patient payment plan you must also create a payment plan in XCharge that matches.
- To create a patient payment plan select the "Payment Plan" dropdown menu and select "Patient Payment Plan".

Open Dental {Chelsea Tonnon} - Test, Test - 1

File Setup Lists Reports Tools eServices Alerts (0) Help

Select Patient Commlog E-mail WebMail Text Letter Forms Tasks Label Popups Dexis VixWinNumbered

Payment Adjustment New Claim Payment Plan Installment Plan Quick Procs Statement DXC Patient Credit Score Care

Family Aging 0-30 31-60 61-90 over 90 0.00 0.00 0.00 0.00

Dynamic Payment Plan  
Patient Payment Plan  
Insurance Payment Plan

Pat Est Bal 0.00 Unearned 0.00 Ins Rem

Main Show Fam Urgent Fin No

Date	Guarantor	Patient	Typ	C	None	2,370.00	2,370.00	0.00	0.00	2,370.00	399.00
12/04/2021	Test, Test	Test, Test	PP	None	2,370.00	2,370.00	0.00	0.00	2,370.00	399.00	
12/04/2021	Test, Test	Test, Test	Ins	None	2,000.00	2,000.00	0.00	0.00	2,000.00	0.00	

PrincPaid Balance Due Now

Service Date View  
Credit Card Manag

Select Patient  
Patient B  
Test, Test  
Entire Family

Patient Account | Auto Ortho

- Correct the provider
- Enter the total amount and if there is a down payment. We do not charge interest therefore the APR = 0.
- Add the date of the first payment and how many payments will be needed.
- Click "Create Schedule" and the payment plan will populate.
- You must attach this payment schedule to a particular code or else it will show that the patient has a balance therefore click "View Tx Credits"

Category: None

Patient: Test, Test Go To

Guarantor: Test, Test Go To Change

Same for all charges

Provider: NC- Coughlin, Nathan

Date of Agreement: 12/04/2021

Terms

Total Amount: 2370.00

Date of First Payment: 12/04/2021

Down Payment: 399

APR (for example 0 or 18): 0

Recalculate

More Options

Create Schedule

Number of Payments: 17

Payment Amt:

Total Cost of Loan: 2370.00

Accumulated Due: 399.00

Paid so far:

Principal paid so far:

Tx Completed Amt:

Total Tx Amt: 0.00

View Tx Credits

This should usually match the total amount of the pay plan.

Date	Provider	Description	Principal	Interest	Due	Payment	Adjustment	Balance
12/04/2021	NC	#1 Downpayment	399.00	0.00	399.00			399.00
01/15/2022	NC	#2	115.95	0.00	115.95			514.95
02/15/2022	NC	#3	115.95	0.00	115.95			630.90
03/15/2022	NC	#4	115.95	0.00	115.95			746.85
04/15/2022	NC	#5	115.95	0.00	115.95			862.80
05/15/2022	NC	#6	115.95	0.00	115.95			978.75
06/15/2022	NC	#7	115.95	0.00	115.95			1094.70
07/15/2022	NC	#8	115.95	0.00	115.95			1210.65
08/15/2022	NC	#9	115.95	0.00	115.95			1326.60
09/15/2022	NC	#10	115.95	0.00	115.95			1442.55
10/15/2022	NC	#11	115.95	0.00	115.95			1558.50
11/15/2022	NC	#12	115.95	0.00	115.95			1674.45
12/15/2022	NC	#13	115.95	0.00	115.95			1790.40
01/15/2023	NC	#14	115.95	0.00	115.95			1906.35
02/15/2023	NC	#15	115.95	0.00	115.95			2022.30
03/15/2023	NC	#16	115.95	0.00	115.95			2138.25
04/15/2023	NC	#17	115.95	0.00	115.95			2254.20
05/15/2023	NC	#18	115.80	0.00	115.80			2370.00

Exclude past activity ☐ Current Totals 399.00 0.00 399.00 0.00 0.00 399.00

Note

12/04/2021 - Date of Agreement: 12/04/2021, Total Amount: 2370.00, APR: 0, Total Cost of Loan: 2370.00

+ Add + Add Adjustment Clear Schedule Print OK Cancel

Patient Payment Plan

Category: None

Patient: Test, Test

Guarantor: Test, Test

Payment Plan Procedures and Credits

Print

Hide Unattached Procedures

Show procedures that have not

Amortization Schedule

Double click the procedure the payment plan is attached to.

Date	Provider	Stat	Code	Fee	Rem Before	Credit Date	Amount	Rem After	Note
12/04/2021	NC	C	D8080	4370.00	2370.00				
10/22/2021	CC	TP	D2949	144.00	144.00				
10/22/2021	CC	TP	D2740	757.00	713.20				
10/22/2021	CC	TP	D2950	144.00	144.00				
06/11/2021	CC	TP	D2940	55.00	11.00				
06/11/2021	CC	TP	D3221	109.00	21.80				
06/11/2021	CC	TP	D2940	55.00	11.00				
06/11/2021	CC	TP	D3221	109.00	21.80				
03/12/2019	CC	TP	D6740	759.00	379.50				
03/12/2019	CC	TP	D6245	759.00	379.50				
03/12/2019	CC	TP	D6740	759.00	379.50				
03/12/2019	Dr.Adame	TP	D2393	152.00	30.40				
03/12/2019	CC	TP	D2392	119.00	63.80				
01/30/2020	CC	TP	D2740	757.00	378.50				
01/30/2020	CC	TP	D2950	144.00	144.00				

Total Credits Attached: 2370.00

OK Cancel

Amortization Schedule

Payment	Adjustment	Balance
		399.00
		514.95
		90
		85
		80
		75
		70
		65
		60
		55
		50
		45
		40
		35
		30
		25
		20
		15
		10
		05
		00

Credit Information

Code: None

Date:

Amt:

Note:

Add Delete

Clear

Deselects everything in the grid.

OK Cancel

+ Add + Add Adjustment Clear Schedule

Print OK Cancel

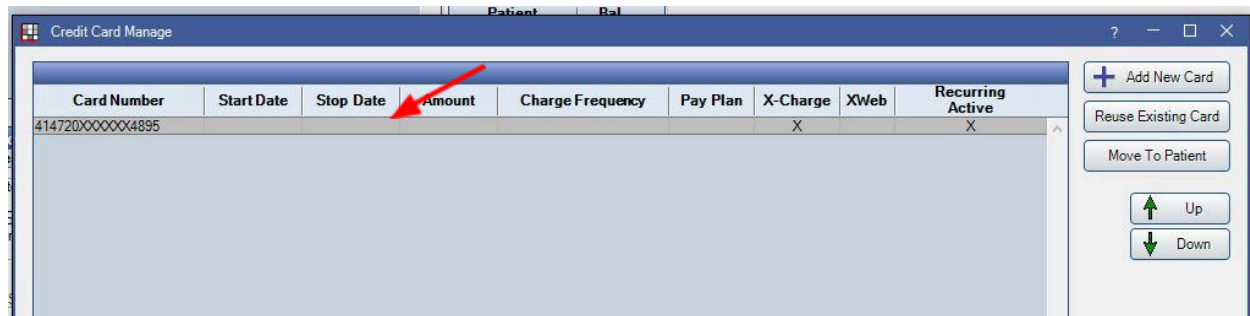
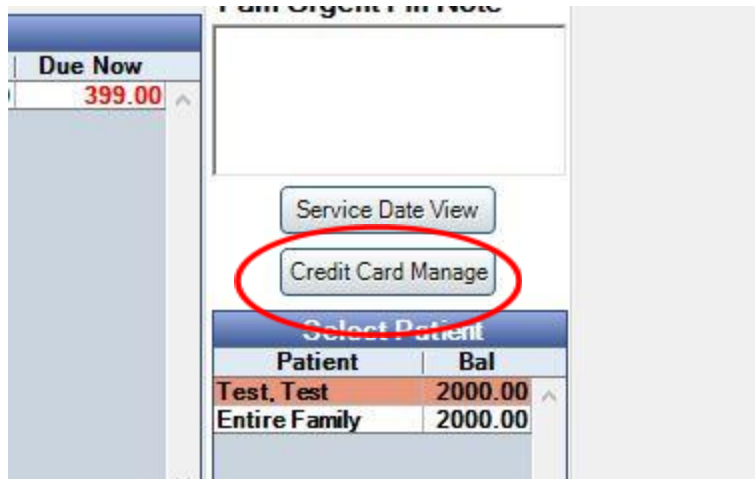
- Be sure to Print the payment plan, have the patient sign, and scan it into the chart. The patient can have the original receipt.

## Patient Payment Plans Entry Into XCharge

Once the patient payment plan has been created you must then create an XCharge payment plan. OpenDental will not automatically charge patients and that is why you must create a plan via XCharge (our credit card processor).

- Double click the "Credit Card Manage" and select the credit card that will be used for the payment plan.





- Once the credit card is selected, enter the "Payment Plan", "Charge Amount", "Date Start" and "Date Stop". In the note section write what the payment plan is for and your initials.
  - It is crucial you add the "Date Stop" or else the payment plan will run forever.
- Also, check off the "Run charge even if no patient balance present" and "Is Recurring Active".
- Check to see if the "Charge Frequency" is correct or modify as needed and push OK.



**Credit Card Edit**

Card Number: 414720XXXXXX4895

Exp (MMYY): 0624

Address:

Zip:

**Authorized Recurring Charges**

Payment Plan: 2370.00 Test Test

Payment Type Override: Use Default

Charge Amount: 300

Date Start: 01/15/2022

Date Stop: 01/15/2023

Note: Payment plan for braces. NC

Run charge even if no patient balance present ☒

Is Recurring Active ☒

Date Stop will be blank if the charges will be repeated indefinitely. Clear all these values if no further recurring charges are planned.

**Charge Frequency**

15th day of the month

☒ Fixed day(s) of month

15

☐ Fixed week day

Every Monday of the month

Delete OK Cancel

## **Insurance Payment Plans**

- Insurance payment plans must be created for any insurance plan that will pay out over time. This is mainly used for orthodontics.
- To create an insurance payment plan first click on the procedure code that you are generating a payment plan for.
- Next, click on the drop-down arrow for Payment Plans and select Insurance Payment Plan.
- Select the correct provider, insurance plan, total amount, estimated date of the first payment (be as accurate as possible but you may not know), and a total number of payments.
  - The total amount of payments will be the least amount of months in a patient's treatment plan. For example, if an orthodontic treatment is 18-24 months put 18 months as the number of payments.
  - Do not be concerned with the number of payments rather concentrate on the total amount.
- The total amount of payment should match the "Tx Completed Amt".
- Create Schedule.

**Insurance Payment Plan**

Category: None  
 Patient: Test, Test  
 Same for all charges: Provider: NC- Coughlin, Nathan  
 Insurance Plan: Delta Dental of WA (Test Test)  
 Date of Agreement: 12/04/2021  
 Terms: Total Amount: 2000.00  
 Date of First Payment: 01/04/2022  
 Down Payment: 0.00  
 APR (for example 0 or 18): 0  
 Number of Payments: 12  
 Payment Amt:   
 Total Cost of Loan: 2000.00  
 Accumulated Due: 0.00  
 Paid so far: 0.00  
 Principal paid so far: 0.00  
 Tx Completed Amt: 2000.00  
 Recalculate  
 More Options  
 Create Schedule

**Amortization Schedule**

Date	Provider	Description	Principal	Interest	Due	Payment	Adjustment	Balance
01/04/2022	NC	#1	166.67	0.00	166.67			166.67
02/04/2022	NC	#2	166.67	0.00	166.67			333.34
03/04/2022	NC	#3	166.67	0.00	166.67			500.01
04/04/2022	NC	#4	166.67	0.00	166.67			666.68
05/04/2022	NC	#5	166.67	0.00	166.67			833.35
06/04/2022	NC	#6	166.67	0.00	166.67			1000.02
07/04/2022	NC	#7	166.67	0.00	166.67			1166.69
08/04/2022	NC	#8	166.67	0.00	166.67			1333.36
09/04/2022	NC	#9	166.67	0.00	166.67			1500.03
10/04/2022	NC	#10	166.67	0.00	166.67			1666.70
11/04/2022	NC	#11	166.67	0.00	166.67			1833.37
12/04/2022	NC	#12	166.63	0.00	166.63			2000.00

Exclude past activity ☐ **Current Totals**

Note: 12/04/2021 - Date of Agreement: 12/04/2021, Total Amount: 2000.00, APR: 0, Total Cost of Loan: 2000.00

+ Add + Add Adjustment Clear Schedule Print OK Cancel

Any orthodontic patient who is on a payment plan and has insurance MUST HAVE TWO PAYMENT PLANS. One for the patient and one for the insurance company.

Family	0-30	31-60	61-90	over 90	Total	-InsEst	=Est Bal	Pat Est Bal	Unearned	Ins Rem
Family	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Payment Plans										
Date	Guarantor	Patient	Typ	Category	Principal	Total Cost	Paid	PrincPaid	Balance	Due Now
12/04/2021	Test, Test	Test, Test	PP	None	2,370.00	2,370.00	0.00	0.00	2,370.00	399.00
12/04/2021	Test, Test	Test, Test	Ins	None	2,000.00	2,000.00	0.00	0.00	2,000.00	0.00

Once the Insurance Payment plan has been entered, you must then attach the claim to that payment plan so that when we do receive payments, the payment plan will update. To do this, simply open up the claim. If the claim has been paid it will show as "Recd" under "Status". If there has already been more than one payment, the next payment will show as "Supp"

#	Date	Prov	Code	Tth	Description	Fee	Billed to Ins	Deduct	Ins Est	Ins Pay	WriteOff	Status	Pmt	Pay Tracking	Remarks
1	07/29/2021	NC	D8090		comprehensive orthodontic treatment of the adult dentition	5807.00	6599.00	0.00	2000.00	561.50	0.00	Recd	X		
1	07/29/2021	NC	D8090		comprehensive orthodontic treatment of the adult dentition	5807.00	0.00	0.00	0.00	228.00	0.00	Supp	X		sept, oct, nov 2021

You will need to attach ALL payments to the payment plan. To do so, just double click on the first procedure (Recd), Click “OK” on the next small box that pops up and the “Edit Claim Procedure” box will appear. At the bottom of the box you will see a box that says “Attached to Insurance Plan” check that box.

The screenshot shows the 'Edit Claim Procedure' window with the following details:

- Ins Plan:** Cigna
- Status:** Received
- Payment Tracking:** None
- Provider:** NC
- Pay Entry Date:** 08/12/2021
- Payment Date:** 08/12/2021
- Procedure Date:** 07/29/2021
- Description:** comprehensive orthodontic treatment of th
- Claim:**
  - ☐ This is an estimate only. It has not been attached to a claim.
  - ☒ This is part of a claim.
- Code Sent to Ins:** D8090
- Fee Billed to Ins:** 6,599.00
- Remarks from EOB:** (Empty text box)
- Fee:** 5807.00
- Fee Schedule:** Cigna (Z200 Advantage)
- Carrier Allowed Amount:**
  - Substitution Code: (Empty)
  - PPO Fee Schedule: (Empty)
  - Allowed Fee Schedule: (Empty)
- Allowed Amt:** (Empty)
- Patient Copay:** (Empty)
- Deductible:** 50.00
- Percentage %:** 50
- Paid By Other Ins:** 0.00
- BaseEst (no max or deduct):** 2903.50
- Insurance Estimate:** 2000.00
- Write Off Estimate:** (Empty)
- Estimate Note:** Over lifetime max
- Values above change based on current insurance information.**
- Claim Info:**
  - Deductible: 0.00
  - Insurance Estimate: 2000.00
  - Insurance Paid:** 561.50
  - Write Off: 0.00
  - Estimated Patient Portion: 5245.50
- Buttons:** Delete, ☒ Attached to Insurance Payment Plan, OK, Cancel

Do the same thing for any supplemental payments after that.

## I. Confirming Appointments

You must constantly train your patients to be on time. If they are late your schedule will be compromised.

Remember to enforce our confirmation policy in a nice and encouraging way. Most patients understand and for the 1% that don't get it at least they will have heard our policy and will think twice before being late.

- Confirm all 2 day out appointments before 10 am. If they have not confirmed by 5 pm they will be moved to the GHOST COLUMN.

- Confirm all appointments for the following day before 10 am. **All appointments require verbal, text, or lighthouse confirmation in order to remain on the schedule.**
- All appointments not confirmed by 12 pm for the following day **MUST BE BROKEN AND MOVED OFF THE APPOINTMENT SCHEDULE.** (Do not delete the appointment)
- Text or call all broken appointments by 1 pm for the following day letting them know their appointment has been canceled and to call back to schedule a new appointment.

## Confirmation calls

***“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.

## 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.
- It is now your responsibility to contact our unscheduled treatment list, broken appointment list, or recall list to fill that broken appointment with an MVP patient. ( **See MVP Scripts**)

***“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!”***

Always notate any communication with patients in the CommLog and initial your note.

Once the patient is moved immediately start contacting patients on the unscheduled treatment list and broken appointment list and try to get them in as our MVP patients.

**The flow of confirmations:**

1. The patient makes an appointment and lighthouse immediately emails them the appointment time. The patients cannot confirm at this point, they are only notified of the appointment.
2. 2 days before their appointment, lighthouse will text or email the patients to confirm their appointment. If an office does not have lighthouse chair 1 will call/text for appointments that are the day after tomorrow.
  - a. If the patient does not confirm by 5 pm for the appointments 2 days from today they will be moved to the ghost column.
3. 1 day before the patient's appointment chair 1 calls/texts before 10 am.
  - a. If the patient does not respond by 12 pm the appointment is broken and moved off the schedule.
    - i. Chair 1 will call/text the patient by 1 pm to let them know their appointment has been removed.
4. Immediately contact the available patient lists to search for an MVP patient.

**J. Schedule Review**

- Review the schedule for the following day.
  - Make sure all appointments are confirmed or moved to the ghost column.
  - Check all copays for the following day
  - Ensure all appointments are correctly made (that comp exams do not have random fillings attached).
  - Add fluoride to all cleaning appointments. If fluoride is not covered we will waive the cost.

**K. End of Day Duties**

- Review the schedule to make sure all patients are confirmed.
- Review schedule for any medical clearance patients or any other special arrangements.
- All transfer patients have radiographs, charts, etc. scanned in.
- All consents are ready and copays are notated on the chart for the following day.
- Stock and clean restroom
- End-of-day cleaning duties as assigned.
- Run reports needed to gather end-of-day reports.
- HELP OTHERS get the office ready for closing.
- Make sure everything on the daily checklist has been completed and given to the manager.
- To find Referral numbers go to "Reports", select "Referral Analysis" and change the report to today's date and select all providers.

**Reports**

Setup

User Query      Laser Labels

Production and Income

Today  
Yesterday  
This Month  
Last Month  
This Year  
More Options  
Monthly Production Goal

Daily

Adjustments  
Payments  
Procedures  
Writeoffs  
Incomplete Procedure Notes  
Routing Slips  
Unfinalized Insurance Payments

Lists

Active Patients  
Appointments  
Birthdays  
BrokenAppointments  
Insurance Plans  
New Patients  
Patients - Raw  
Patient Notes  
Prescriptions  
Procedure Codes - Fee Schedules  
**Referrals - Raw**  
**Referral Analysis**  
**Referred Proc Tracking**  
Treatment Finder  
Web Sched Appointments  
Discount Plans  
Hidden Payment Splits

## Referral Analysis

12/03/2021 - 12/03/2021

thSon, Dr.You, MF, NC, Office, TMHP-CK, TMHP- SV, VU, K Nam, TM

Date: 12/06/2021

Last Name	First Name	Count	Production
Crystal Weekend		2	322.00
Online Appt Req		2	322.00
Yassin		1	74.00
LocalMed		1	192.00
Walk-IN		1	0.00
Insurance Comp		1	307.00
Zaidi		1	134.00
Thrive		1	0.00
Google		1	1,305.00
Saw Sign		1	0.00
			<b>2,656.00</b>

Month:						
<b>MORNING 8:30-10 AM</b>	<b>M</b>	<b>T</b>	<b>W</b>	<b>R</b>	<b>F</b>	<b>S</b>
Checked Lighthouse for any messages/issues						
Responded to Google/Facebook/Yelp reviews						
Reviewed/responded to all emails						
Lobby and restroom are clean						
New Pt paperwork is stocked as well as informed consents are ready						
Music is on and all TVs/Video games are on						
Contact any patient who's autopay was declined						
Contact patients who are not confirmed for tomorrow						
Patients Copay is checked and marked in every patients chart						
Laptop is open and marked as a Kiosk for NP paperwork						
Schedule is filled for the day by 10 am (Managers Only) use MVP, Recall, Unsch Tx etc.						
Any ortho patient is marked as tx pending or NP for general side in case crossover needed						
<b>BEFORE LUNCH 10-1PM</b>						
Post ops called by 12 pm for Treatment, SRP, Extraction patients						
All appointments confirmed for tomorrow and following day						
All transferred patients paperwork is completed						
Clean and stock restroom						
Clean and check lobby area						
All patient pictures are attached to the chart and all items are scanned						
<b>EVENING 2-7 PM</b>						
All unconfirmed appointments are pushed to ghost column by 1 pm						
Filled schedule with MVP patients (all pts due for tx and cleaning should be called until filled)						
All emails have been addressed (if you cannot respond leave email as "unread")						
Tomorrows appointments have been reviewed/insurance collected/copays on appt						
Tomorrows prescriptions and medical clearances have been addressed						
Whitening tray, retainer and crown seat patients have been called						
<b>CLOSING</b>						
End of Day reports printed (Xcharge report, Daily payment from OD, Bank Deposit slip)						
Cash placed in Daily deposit envelope and given to manager						
All informed consents and NP paperwork ready for tomorrow						
Trash taken out and lobby/bathroom cleaned						
Sweep and clean lobby						
All emails have been reviewed and replied to						
SCHEDULE IS FULL FOR TOMORROW						

## End of Day Email

### Today's

Starting Production: \$

Ending GD Production: \$

Hyg Production: \$

Ortho Production: \$

### Today's Payment

Cash Payments: \$

CC Payments: \$

Insurance Checks: \$

VCC: \$

EFT: \$

Xcharge auto payments: \$

Care Credit: \$

**Today's**

Number NPs:

SDTX: \$

**Referrals**

Patients/Staff (no names just overall #):

Google:

Facebook:

Instagram:

Youtube:

Pinterest:

**Monthly**

MTD Production: \$

MTD Collections: \$

**Reason for not starting SD:**

Pt #: \_\_\_\_\_

**Attachments:** Start of Day Schedule, End of Day Schedule, Payments, Month to Date  
Production/Collection.



## **SECTION 2/ CHAIR 2/ CHECK OUT**

### **A. Job Description**

- Checkout is primarily concerned with checking out patients, taking payments, ordering prescriptions, and scheduling follow-up appointments.
- Asking for reviews/referrals etc.
- No patient should leave the office without a follow-up appointment.

### **B. Opening Duties**

**- Daily front checklist is the responsibility of all front staff.**

- Check voicemail
- Check Email and respond accordingly. Make sure to keep emails “unread” if you cannot respond to them. If you open up an email and do not respond to that patient the email will very likely get lost. This is very poor customer service and must be avoided at all costs.
- Check lighthouse and respond accordingly to any patient issues. Should be done at the beginning and end of the day.
- Respond to any Google, Facebook, or Yelp review with a short but positive response.
- Check recurring payments and call patients whose card was not processed correctly and was denied.

#### **Mid-Day Duties**

- Review daily schedule and pull recall appointments to ensure all perio maintenance and recall appointments have been called.
- Perform follow-up calls for any SRP, treatment and extraction patients that were done the day before.
- Log lab cases and schedule patients accordingly.
- Contact patients to pick up any whitening trays or retainers.

### **C. Patient Greeting/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?”***

You must know if there were any payment arrangements made with the treatment plan coordinator beforehand. Take payment via Cash, CreditCard, or Care Credit (no personal checks) **see Payments.**

***“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

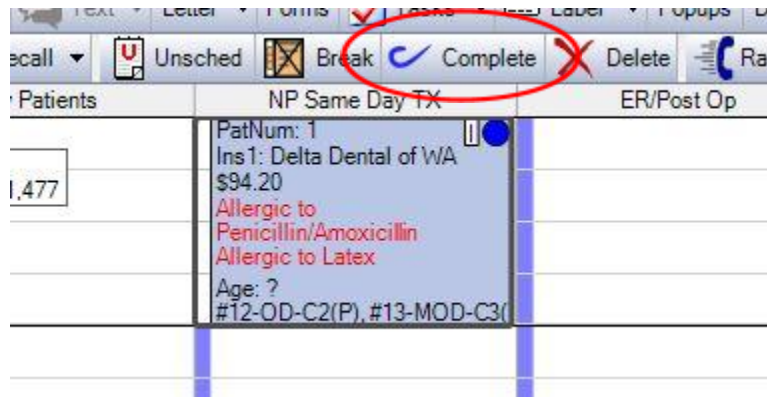
***“Mrs. Smith, it looks like we need to refer you out to \_\_\_\_\_ for that tooth number \_\_\_\_\_. I have the referral information right here.***

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?”***

It is crucial that the patient appointment is set **COMPLETE** as soon as the doctor is done with the correct provider and correct treatment. If it has not been set complete it is the responsibility of the checkout team member to set it complete. This will allow for proper payment to be made by the patient.



## **D. Scheduling**

Scheduling the patient's follow-up appointment is very important. If you miss this opportunity the patient will miss their follow-up cleanings, treatment etc., and the schedule may fall apart. You are the last person the patient sees therefore you must make a great last impression. Patients often get mad when we do not book their next appointment as they believe we should be on top of their dental needs.

Greet the patient with a smile, pleasant attitude and eye contact.

### **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.”***

### **Pending Treatment:**

Always talk to the patient regarding pending treatment. You would be surprised how many people do not know they have treatment remaining. It is our job to make sure patients know they still may have infections in their mouth.

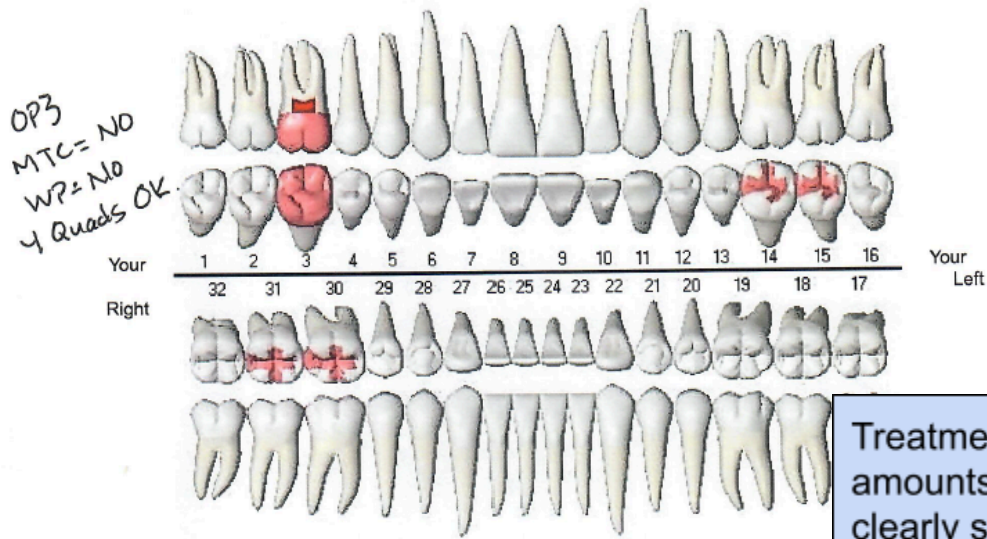
All treatment plans should have been scanned previously so you can reference them physically when talking to patients.

All discounts should be clearly labeled and scanned into the chart.

If a patient has treatment but is already maxed out pre-scheduling them for next year.

When scheduling any treatment reference the treatment plan you have in front of you so you can point at what teeth still need to be worked on.

When scheduling, always try to make patients prepay for their appointments to ensure they show.



Done	Priority	Tth	Surf	Code	Sub	Description	Fee	Allowed	Pri Ins	Sec Ins	Pat
	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
						<b>Subtotal</b>	<b>340.00</b>	<b>210.00</b>	<b>128.00</b>	<b>0.00</b>	<b>212.00</b>
	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
						<b>Subtotal</b>	<b>340.00</b>	<b>210.00</b>	<b>168.00</b>	<b>0.00</b>	<b>172.00</b>
	3	3		D2740		crown - porcelain/ceramic	968.00	0.00	484.00	0.00	484.00
	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
						<b>Subtotal</b>	<b>1145.00</b>	<b>0.00</b>	<b>625.60</b>	<b>0.00</b>	<b>519.40</b>
	4	17		D7240		removal of impacted tooth - completely bony	351.00	0.00	280.80	0.00	70.20
						<b>Subtotal</b>	<b>351.00</b>	<b>0.00</b>	<b>280.80</b>	<b>0.00</b>	<b>70.20</b>
						<b>Total</b>	<b>2176.00</b>	<b>420.00</b>	<b>1202.40</b>	<b>0.00</b>	<b>973.60</b>

Handwritten notes on the right side of the table: 200, 21.00, 500, 0.

Handwritten notes on the left side of the table: L, R, Crown, Wisdom.

Handwritten note at the bottom right: \$800 Total.

- The above treatment plan should have already been scanned into the patient's chart with the initials of the treatment plan coordinator.
  - You should be physically pointing to the treatment plan when scheduling the patient.

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?"**

## Lab Cases

Properly accounting for lab cases is vital for a good patient experience. We must make sure cases are sent out promptly and immediately checked when they arrive.

We must keep detailed accounts of lab cases as labs will sometimes lose cases and/or not send them back. We never want to have a patient come to an appointment without the crown or lab case having been checked and in the office.

To do this properly we must accurately report lab cases in Open Dental.

### Lab Case Sent

- The assistants will be marking the lab case as created and Sent.
  - To do this select the patient and left-click the LabCase box.
  - Indicate the lab case is being sent to, correct the provider, due date, and sent date
    - In the Instructions area write down what tooth it is for, the shade, tracking number, and your initials.

The screenshot shows the 'Edit Lab Case' window with the following details:

- Patient:** Test Test
- Appointment:** (empty)
- Planned Appt:** (empty)
- Provider:** Dr. Vera
- Fee:** 0.00
- Invoice Number:** (empty)
- Lab:** A list of dental labs is shown, with 'Westbrook Dental Lab (972)840-0858' selected.
- Set Due Date:** Mon 12/20/2021
- Instructions:** Crown for #4, Shade A2  
Tracking #1234567 NC
- Tracking:**
  - Created: 12/07/2021 11:55:42 AM
  - Sent: 12/07/2021 11:56:20 AM
  - Received: (empty)
  - Quality Checked: (empty)

Buttons at the bottom include: Delete, New Slip, OK, and Cancel.

### Lab Case Received

When the lab case is received you must check it in and call the patient to set an appointment if they do not already have one.

Have the lead RDA verify the case and if it is a Veneer, Bridge, or Implant case make sure the treating doctor also verifies its accuracy for shade and tooth number.

- Check the crown for the correct tooth number and shade.
- Go to the patient's chart and select "Lab".
- Double click the lab case and enter the date "Received" and "Quality Checked" by RDA or dentist.

**Edit Lab Case**

Patient: MARISSA TEST

Appointment: [Empty]

Planned Appt: [Empty]

Provider: Dr. Vera

Fee: 0.00

Invoice Number: [Empty]

Lab: AOA (800)262-5221, Artisan 3D (210)276-0042, Concert Dental Lab 1-800-449-3514, Helm Dental Lab (972)442-9772, Invisalign (866)866-5941, Reliable Dental Lab (972)272-5511, Studio 360 (866)963-6885, **Westbrook Dental Lab (972)840-0858**

Set Due Date: Crowns, 10

Date Time Due: Tue 12/21/2021 5:00 PM

Instructions: Shade A1 tooth #19, Tracking#123456789, Checked in by NC. (Front Desk), Verified by SB. (Lead RDA or DDS)

**Tracking**

Created	12/07/2021 10:27:15 AM	Now
Sent	12/07/2021 10:27:49 AM	Now
Received	12/07/2021 10:49:35 AM	Now
Quality Checked	12/07/2021 10:49:36 AM	Now

Make sure to indicate when the case was received and initial your name

Buttons: Delete, New Slip, OK, Cancel

- In the CommLog notate that you have called the patient and scheduled their exam.
  - If you cannot get a hold of the patient DO NOT PUT THE CASE AWAY and keep it in view. Too often we attempt to call a patient once and then put away the case never to be seen again.
    - Attempt to call the patient a minimum of 3 times over the span of 2 weeks before putting the case away in the shelving area.

Communication Item - Saved: 12/07/2021 10:58:12 AM


Patient:  User:

Date / Time:

Type	Mode	Sent or Received
ApptRelated	None	Neither
Insurance	Email	Sent
Financial	Mail	Received
Recall	Phone	
Misc	In Person	
After Care Call	Text	
Email Corresponder	Email and Te	

Note:

Called patient for crown on tooth #19 and scheduled for 12/10/21.NC



- When making the appointment for the patient **attach the lab** case to the procedure.
  - Attaching the lab case will remove it from the lab list and allows for better communication in between front and back.
  - This will show up on their appointment and therefore everyone will know the lab case has been received before the patient has been seated.



Edit Appointment - MARISSA TEST on Thursday, 02/07/2019 7:00:00 PM

To attach a lab case just click the "Lab" box and attach the case that was previously made for that patient.

**Patient Info**

Status: UnshedList

ASAP: ☐

Med Status: none

Confirmed: Not Called

New Patient: ☒

Provider: Dr. Vera

Hygienist: AHL (hidden)

Is Hygiene: ☒ (use hyg color)

Assistant: none

Time Locked: ☒

Color: none

Appointment Type: Adult Recall

Time Ask To Arrive:

Time Arrived:

Time Seated:

Time Dismissed:

Lab: Lab

InsPlan 1:

InsPlan 2:

Appointment Note: "UPDATE MEDICAL HISTORY"

Single click on items in the list below to add them to this appointment.

☒ Delete ☒ Add ☒ Attach All

Stat	Priority	Tth	Surf	Code	Description	Fee
TP				Chlorhexidine Mouthwash	Chlorhexidine Mouthwash	15.00
TP				D0120	(other appt) periodic oral evaluation - established patient	39.00
TP				D0274	(other appt) bitewings - four radiographic images	56.00
TP				D1110	(other appt) prophylaxis - adult	100.00
TP				D1110	prophylaxis - adult	100.00
TP				D1208	(other appt) topical application of fluoride - excluding varnish	59.00
TP			UR	D4341	periodontal scaling and root planing - four or more teeth per quadrant	310.00
TP			UL	D4341	periodontal scaling and root planing - four or more teeth per quadrant	310.00
TP			LL	D4341	periodontal scaling and root planing - four or more teeth per quadrant	310.00
TP			LR	D4341	periodontal scaling and root planing - four or more teeth per quadrant	310.00
TP				D4910	periodontal maintenance	135.00
TP		19		D2950	core buildup, including any pins when required	0.00
TP		19		Seat	Seat Crown	0.00

**Select Lab Case**

Select a lab case from the list below or create a new one. This list will not show lab cases that are already attached to other appointments.

Date Created	Lab	Phone	Instructions
Tue 12/07/2021 10:27 AM	Westbrook Dental Lab	(972)840-0858	Shade A1 tooth #19 Tracking#123456789 Checked in by NC. (Front Desk) Verified by SB. (Lead RDA or DDS)

☒ New

OK Cancel

## F. Referrals

Occasionally, you will need to refer a patient to a specialist.

The patient must sign the **HIPAA release** form so we are able to send all records to the dental specialist.

Have the referral ready and if the patient asks for their records we can send it via a Secure Email (SendInc).

It is vital that we do not send patient records without a HIPAA consent and via normal email as this is a violation of HIPAA laws.

## G. Communication

- We must communicate with every patient to make sure they are having a 5 star experience.
- Ask every patient to give us a review on any platform (Google, Yelp, Facebook, Instagram, RateMD, HealthGrades, etc.)
  - Every patient can get up to **3 additional whitening** syringes for each review.

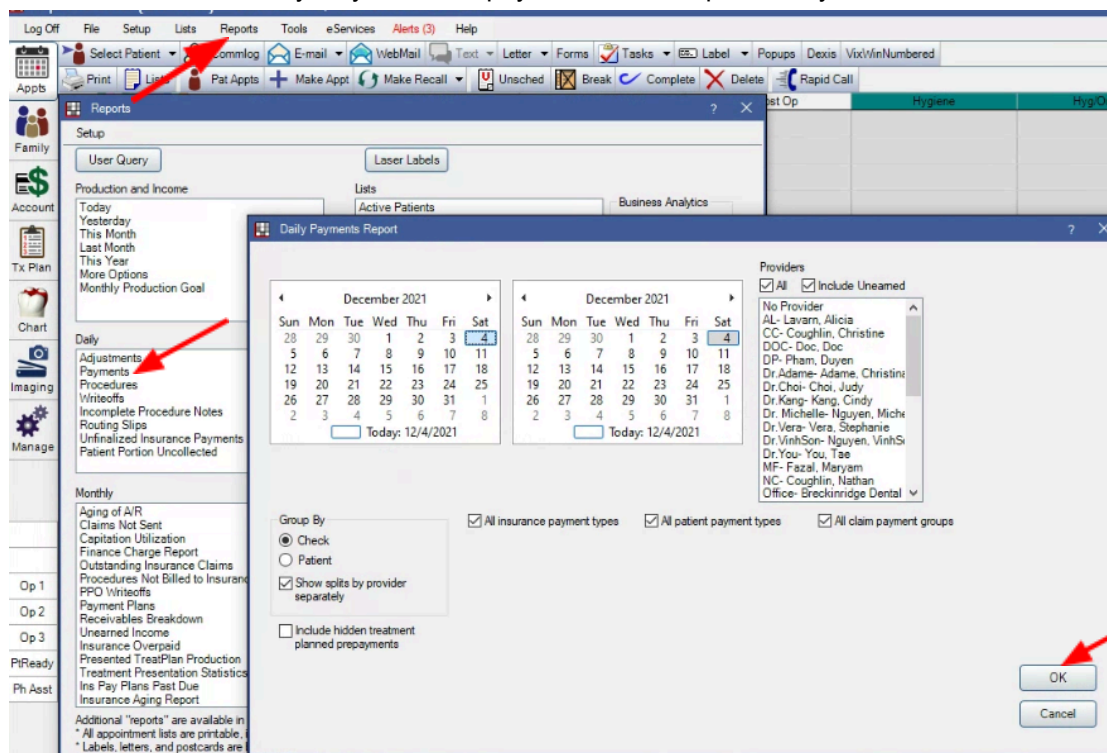
- Make sure every patient gets a copy of their treatment plan and that any referrals are explained properly.
- Ask patients if they need a school or work excuse for their visit.

## H. End of Day Duties

- The end-of-day duties is a comprehensive accounting of the day's transactions including cash, check, credit card, EFT (electronic funds transfers), adjustments, virtual credit cards, and care credit.
- All printouts will be placed in the "Daily Deposit" envelope provided.
- Once all checks and transactions have been completed you must print the "Daily Payments", XCharge EOD report, and Bank Deposit slips.

To print the "Daily Payments" report on Open Dental go to Reports and under the Daily section select "Payments".

Make sure to select today only to see all payments for the specific day.



## Daily Payments

Breckinridge Dental and Orthodontics  
All Providers

### Insurance Payments

#### Check

Date	Carrier	Patient Name	Provider	Check#	Amount
12/03/2021				568203878	52.00
12/03/2021				568203878	55.00
12/03/2021				568203878	77.00
12/03/2021				520994127	74.00
12/03/2021				520994127	55.00
12/03/2021				520994127	38.00
12/03/2021	Delta Dental of WA		Dr. Kang	22559441	40.71
12/03/2021	Guardian		Office	177145861	78.00
12/03/2021	Guardian		Dr. Kang	177145861	45.00
					<b>1,211.94</b>

Check amount must match  
Bank deposit slip.

#### Virtual CC

Date	Carrier	Provider	Check#	Amount
12/03/2021	GEHA	Office	81724810	0.00
12/03/2021	GEHA	Dr. Kang	81724810	22.00
12/03/2021	GEHA	Dr. Kang	81724810	0.00
12/03/2021	Humana	Office	238094230	29.50
12/03/2021	Hu		238094230	51.02
12/03/2021	Hu		238094230	26.14
12/03/2021	Su		0009382714	79.00
12/03/2021	Su		0009382714	45.00
				<b>252.66</b>

Virtual CC plus Credit  
Cards numbers must add up  
to match the XCharge report

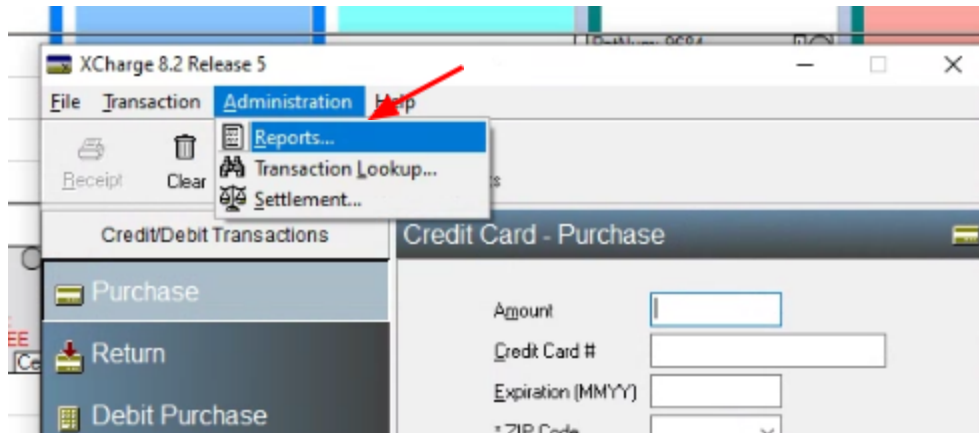
#### Credit Card

Date	Paying Patient	Provider	Check#	Amount
12/03/2021		Dr. Kang	Prepayment	350.00
12/03/2021		Dr. You		39.65
12/03/2021		DP		25.00
12/03/2021		DP		15.80
				<b>3,141.82</b>

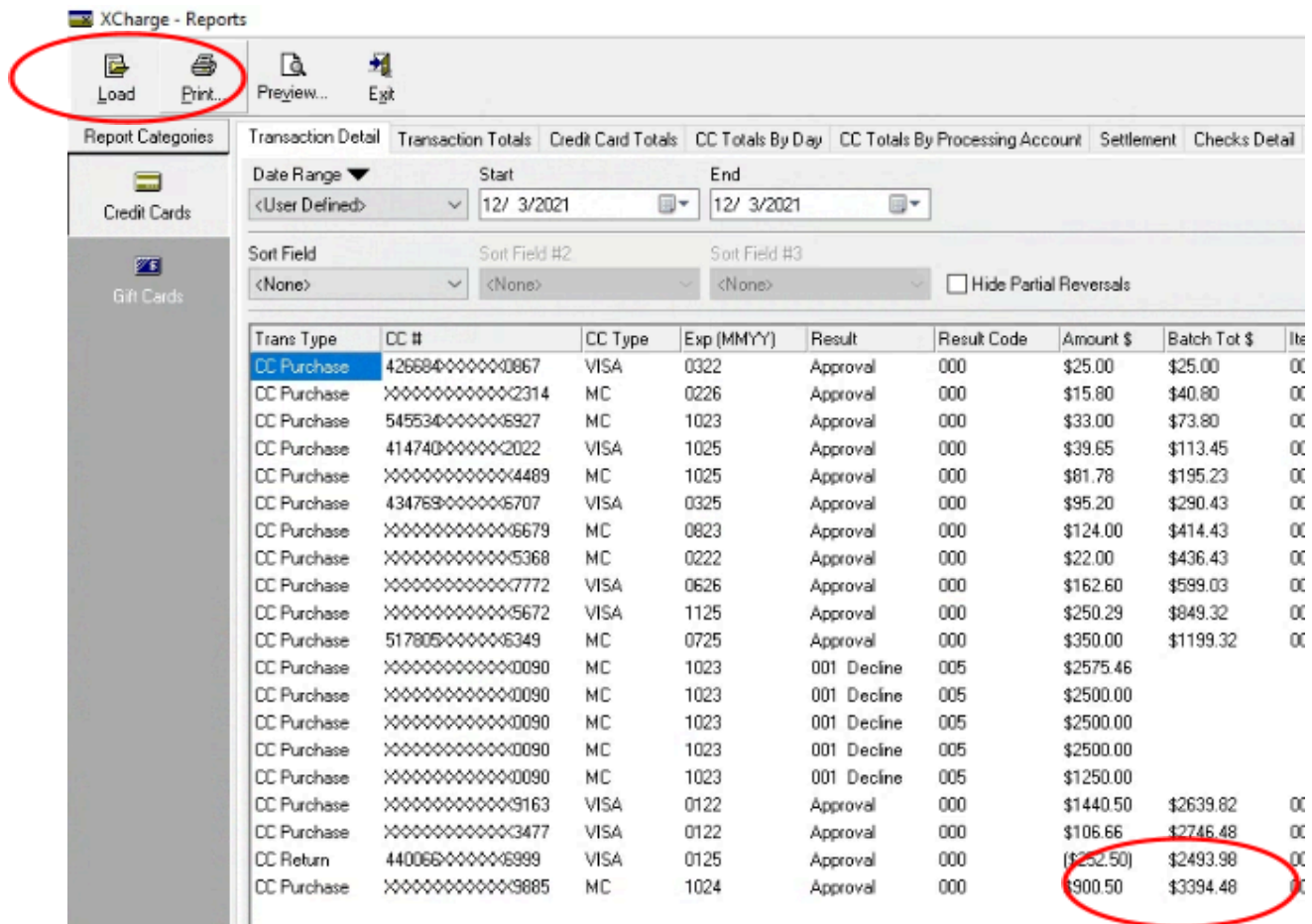
Total Patient Payments: \$3,141.82  
Total All Payments: \$4,606.42

### XCharge Report for Credit Cards

- To verify that all credit card and virtual credit card transactions went through properly check the XCharge report and compare it to the Open Dental "Daily Payments" report.
- The Virtual CC and Credit Card payments should add up to match the total batch amount from XCharge.
- To access the transaction report from XCharge login to XCharge from your computer.
  - Each office has its own login.



- Right-click on “Administration” and “Reports”.



- Set the “Start” and “End” date to today and click on “Load”.
- The Final batch amount should match the VCC plus Credit Card amounts. In our example, if we add up \$252.66 (VCC) + \$3141.82 (CC) we get \$3394.48 which is the total batch amount on Xcharge.

## Cash reconciliation

- Deposit cash EVERY FRIDAY at the registered bank.
  - If your cash total ever is **above \$500** deposit that day.
- The cash placed in the "Daily Deposit" envelope must equal the cash on the Daily Payments area from Open Dental.
- Fill in every box and sign/date at the bottom.

### DAILY DEPOSIT

Date:	Day:	
Clinic:	City:	
Please circle all that apply: OPENED   CLOSED DEPOSIT   NO DEPOSIT		
Cash		\$
Minus Petty Cash Retained (show receipt)	-	\$
Total Cash Deposit (deposited weekly)	=	\$
Check Deposits (Personal and Insurance)	\$	
Care Credit	\$	
Credit Card (including VCC etc)	\$	
Automatic Payments	\$	
Insurance EFT	\$	
Notes:		
Deposit Completed by (sign and print):		

This is the Daily Deposit Envelope which must be Filled at the end of every day.  
Cash inside this envelope must match the Open Dental report

## Check reconciliation

- Total deposited checks must match the bank deposit slip for the day.
- Print out the Bank Deposit slip and match it to the Daily Payments in Open Dental.

## In the Daily Deposit envelope you will have:

1. Cash from the day
2. Xcharge report
3. Daily Payment report from Open Dental
4. Bank Deposit slip
5. The checks that were deposited

It is vital that all cash, check, and credit card transactions match. If they do not match exactly you must audit the accounts to find out which transaction was mislabeled or did not run as predicted.

## FRONT TEAM CHECKLIST:

Month:						
	M	T	W	R	F	S
<b>MORNING 8:30-10 AM</b>						
Checked Lighthouse for any messages/issues						
Responded to Google/Facebook/Yelp reviews						
Reviewed/responded to all emails						
Lobby and restroom are clean						
New Pt paperwork is stocked as well as informed consents are ready						
Music is on and all TVs/Video games are on						
Contact any patient who's autopay was declined						
Contact patients who are not confirmed for tomorrow						
Patients Copay is checked and marked in every patients chart						
Laptop is open and marked as a Kiosk for NP paperwork						
Schedule is filled for the day by 10 am (Managers Only) use MVP, Recall, Unsch Tx etc.						
Any ortho patient is marked as tx pending or NP for general side in case crossover needed						
<b>BEFORE LUNCH 10-1PM</b>						
Post ops called by 12 pm for Treatment, SRP, Extraction patients						
All appointments confirmed for tomorrow and following day						
All transferred patients paperwork is completed						
Clean and stock restroom						
Clean and check lobby area						
All patient pictures are attached to the chart and all items are scanned						
<b>EVENING 2-7 PM</b>						
All unconfirmed appointments are pushed to ghost column by 1 pm						
Filled schedule with MVP patients (all pts due for tx and cleaning should be called until filled)						
All emails have been addressed (if you cannot respond leave email as "unread")						
Tomorrows appointments have been reviewed/insurance collected/copays on appt						
Tomorrows prescriptions and medical clearances have been addressed						
Whitening tray, retainer and crown seat patients have been called						
<b>CLOSING</b>						
End of Day reports printed (Xcharge report, Daily payment from OD, Bank Deposit slip)						
Cash placed in Daily deposit envelope and given to manager						
All informed consents and NP paperwork ready for tomorrow						
Trash taken out and lobby/bathroom cleaned						
Sweep and clean lobby						
All emails have been reviewed and replied to						
SCHEDULE IS FULL FOR TOMORROW						

## End of Day Email

### **Today's**

Starting Production: \$

Ending GD Production: \$

Hyg Production: \$

Ortho Production: \$

### **Today's Payment**

Cash Payments: \$

CC Payments: \$

Insurance Checks: \$

VCC: \$

EFT: \$

Xcharge auto payments: \$

Care Credit: \$

### **Today's**

Number NPs:

SDTX: \$

### **Referrals**

Patients/Staff (no names just overall #):

Google:

Facebook:

Instagram:

Youtube:

Pinterest:

### **Monthly**

MTD Production: \$

MTD Collections: \$

### **Reason for not starting SD:**

Pt #: \_\_\_\_\_

**Attachments:** Start of Day Schedule, End of Day Schedule, Payments, Month to Date Production/Collection.



## SECTION 3 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. Per OSHA nails cannot be longer than 1/4inch past the finger. Hair color has to be natural (no bright blues, pinks, etc.)
- e. 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 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. We will not ever be charging patients this amount but we can let them know that is our policy.

### **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 there.

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 incorrect and the manager having to reconcile any mistakes that were said.

### **The 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 remove 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. 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 are from Amazon or similar companies. If 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 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.