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!

Table of Contents

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:

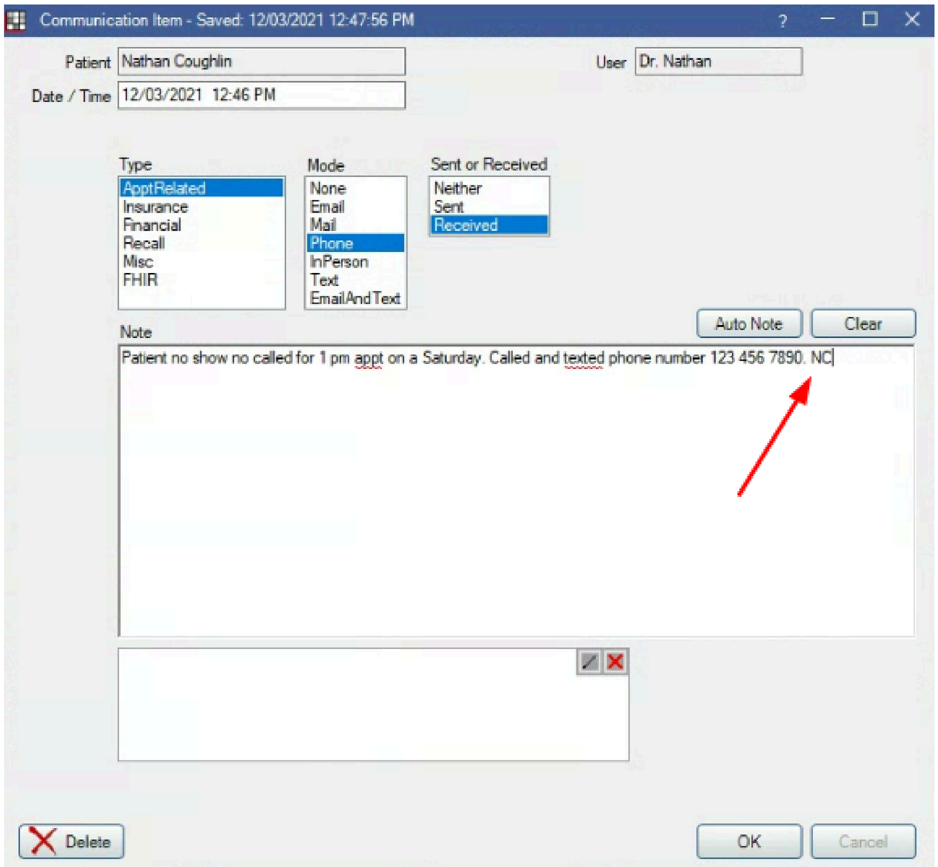
- Restock Restroom
- Clean Lobby
- Confirmation calls are all completed
- Patient paperwork, consents, copays are all ready for tomorrow.

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.



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

D. <u>Patient Introduction/Greeting</u>

- 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 <u>DO NOT MAKE A BIG DEAL OUT OF IT</u> 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.

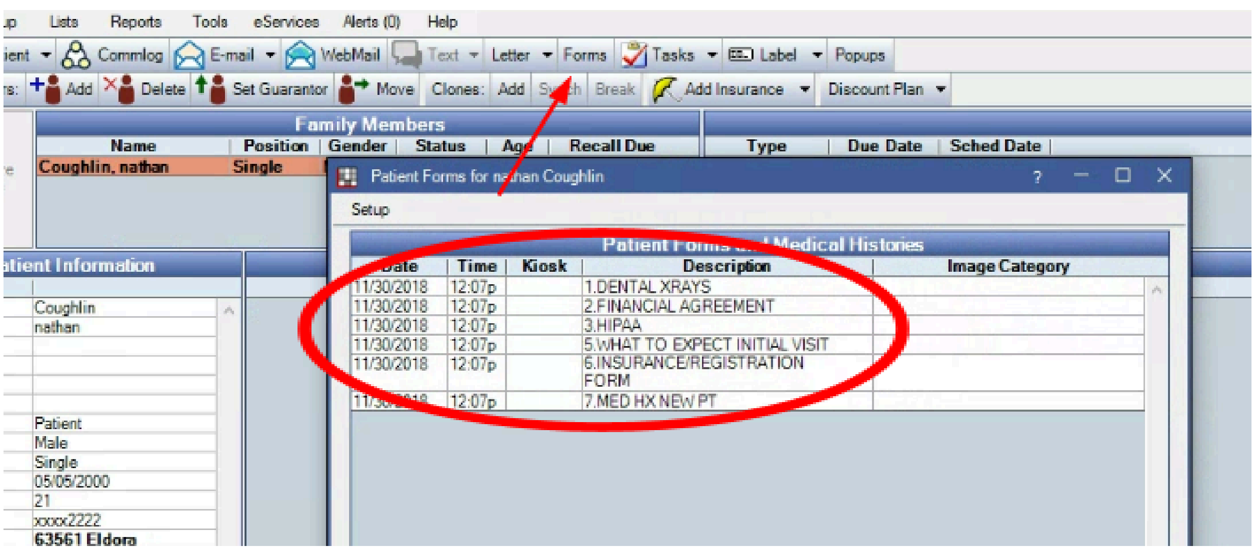
- Over the earpieces let the back staff know that the patient is “**ready to go back**”. You should get a response but you do not ask again in 2 minutes. If you have asked **twice** and there is still no response ask “**Do you need me to bring the patient back to a room?**”. If the back staff is busy, 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.

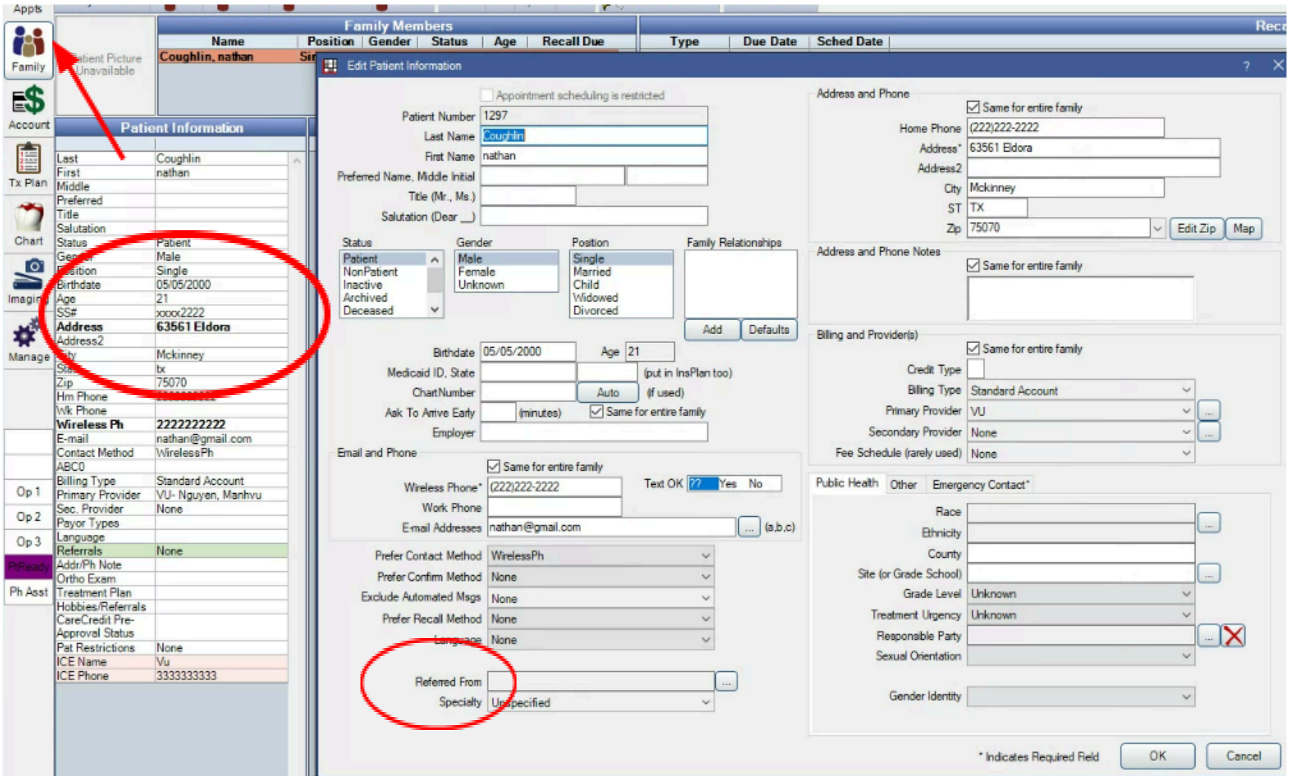
F. Processing/Entering paperwork

- 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.



- 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.

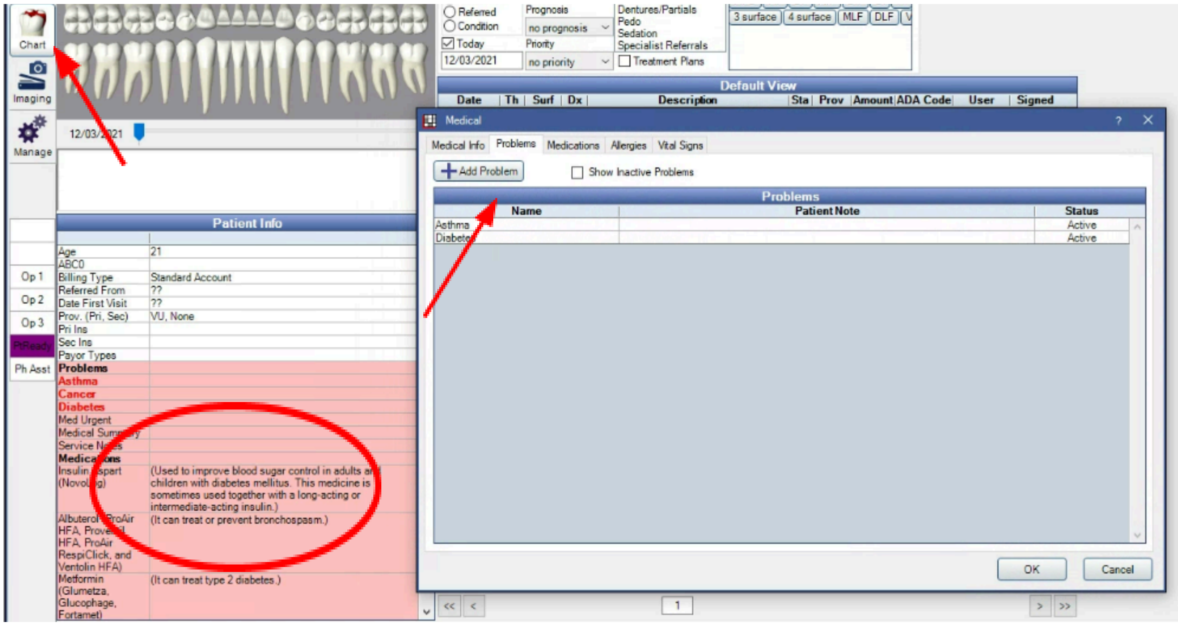
- To enter patients’ date of birth, SSN, email, phone number, address, etc. click on the “Family” module and then double click the “Patient Information” area. An “Edit Patient Information” section will appear where you can fill out all necessary information.



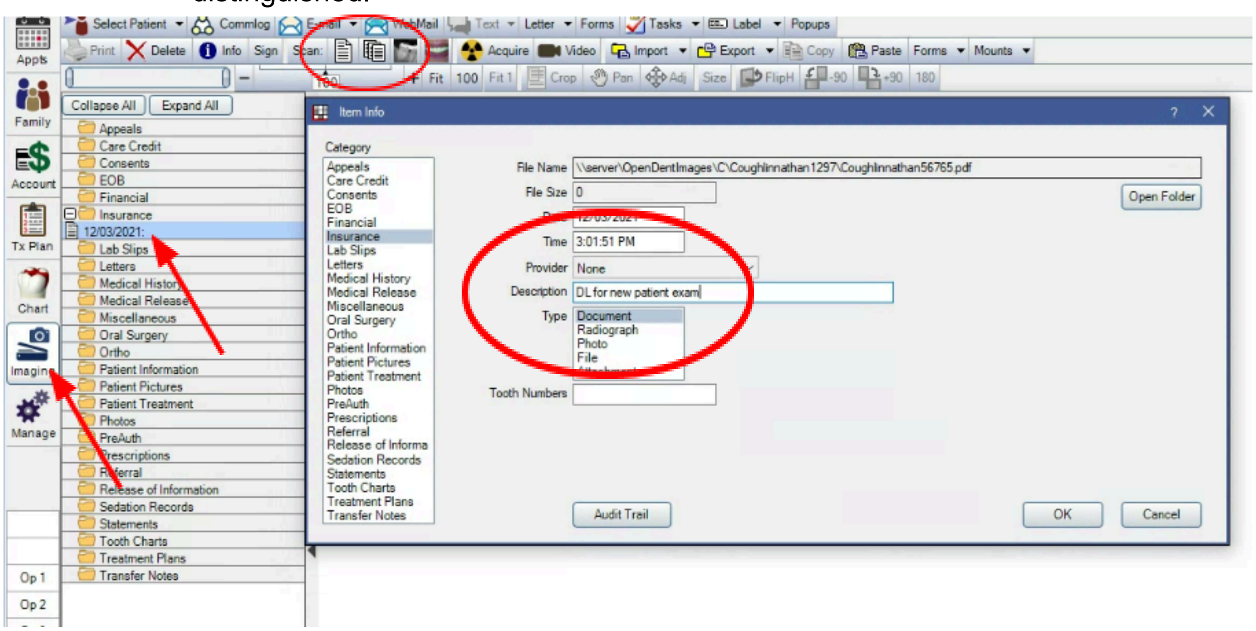
- Enter “Referred From” whether it was an existing patient, drive-by, google, Facebook, etc. This is important information as it allows us to know if our marketing is working. If more than one of these applies to you which one “**made you take action**” to come into the office.

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.

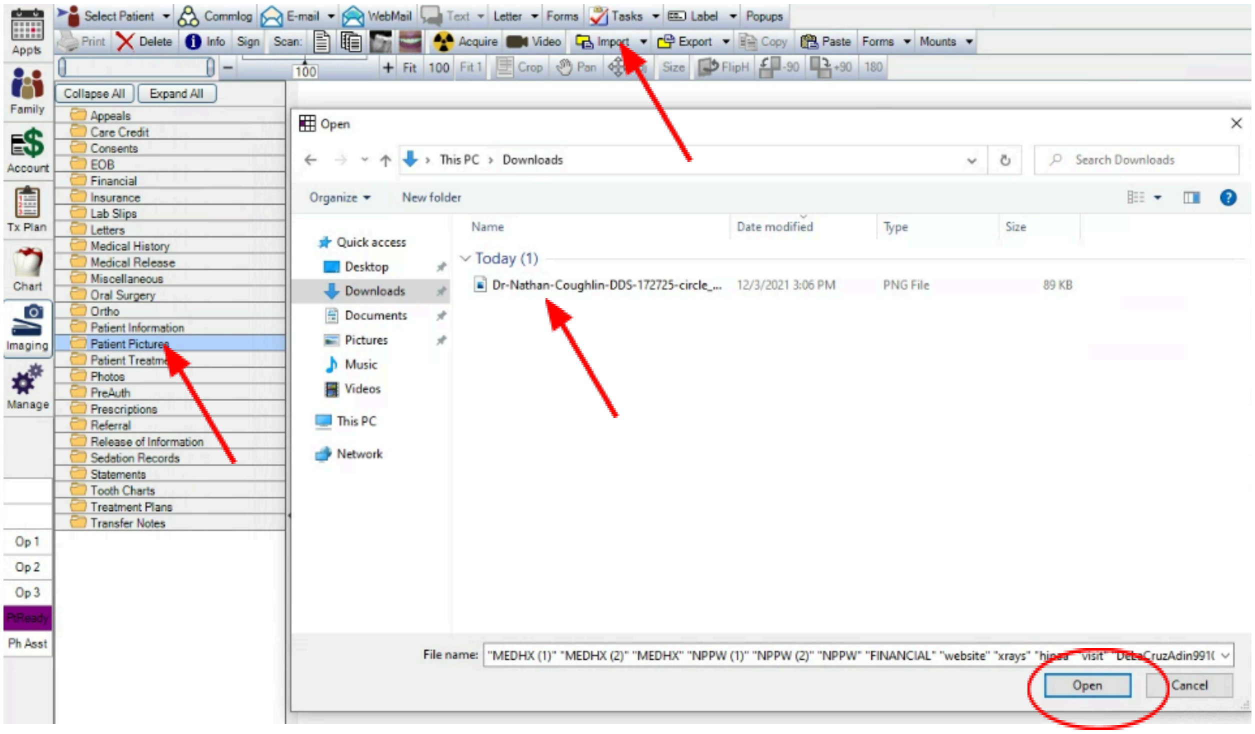
- To add a medication or health condition, double click the red area and “+ Add Problem” button.

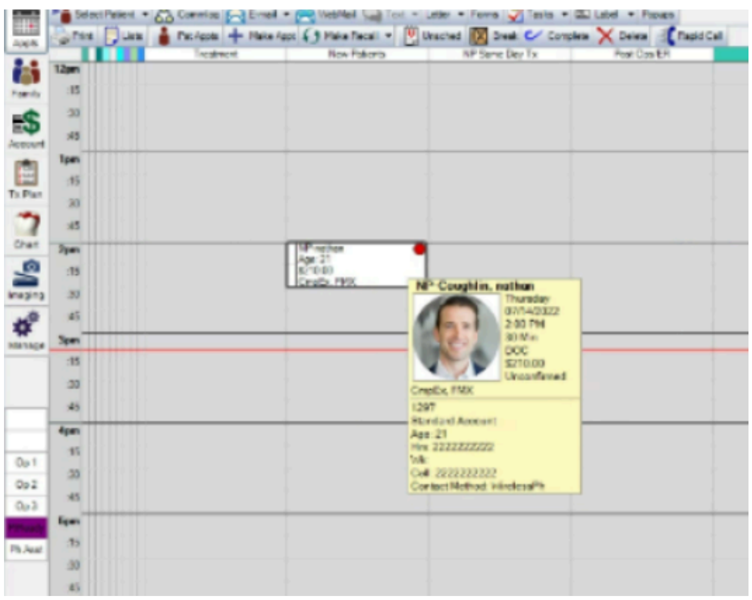


- All new patients' IDs/Drivers' License, Insurance cards, and paperwork must be scanned into the charts in the "Imaging" module.
- To scan paperwork click on "Imaging" and then the folder you want the image to go into.
  - Once the folder is selected click on the multi-paper icon.
  - The scanned document 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 haved 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

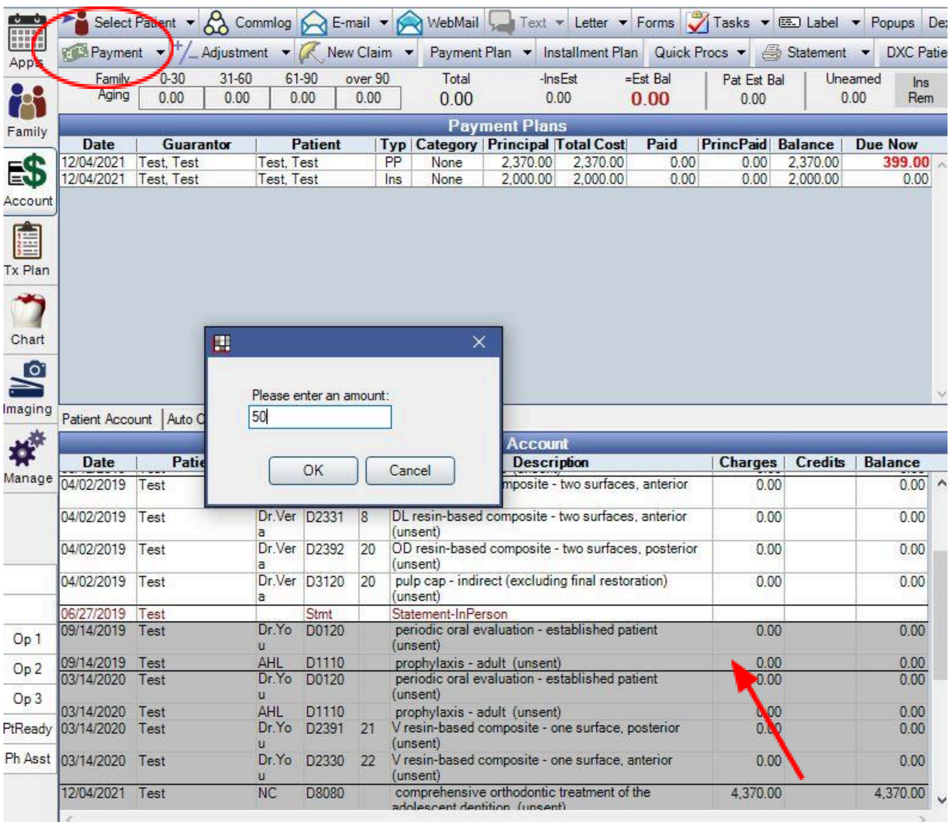
Our payment guidelines are as follows:

- 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.

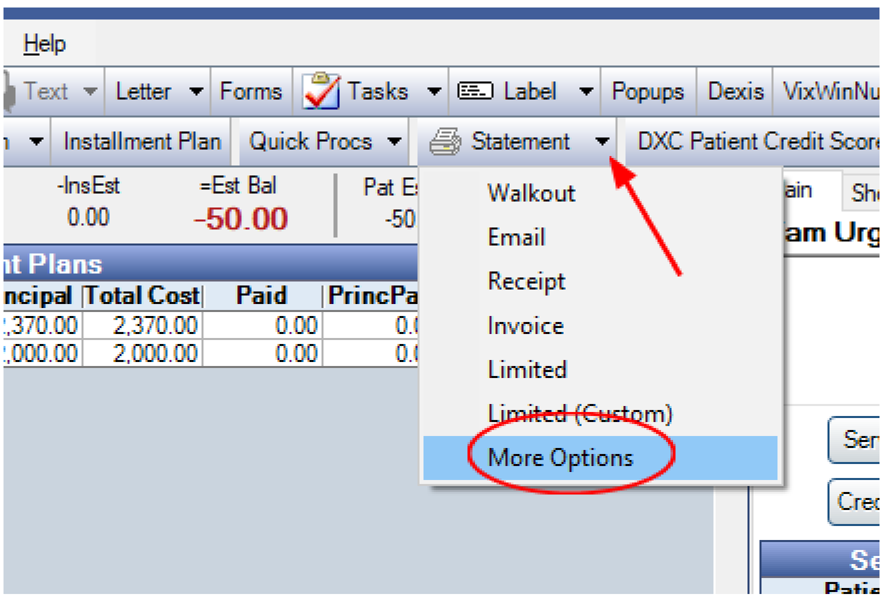


- Under Payment type select “Cash”
- In the notes section be sure to indicate what teeth or procedures this payment is for and initial. Finalize transaction by pushing OK.

- 

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.



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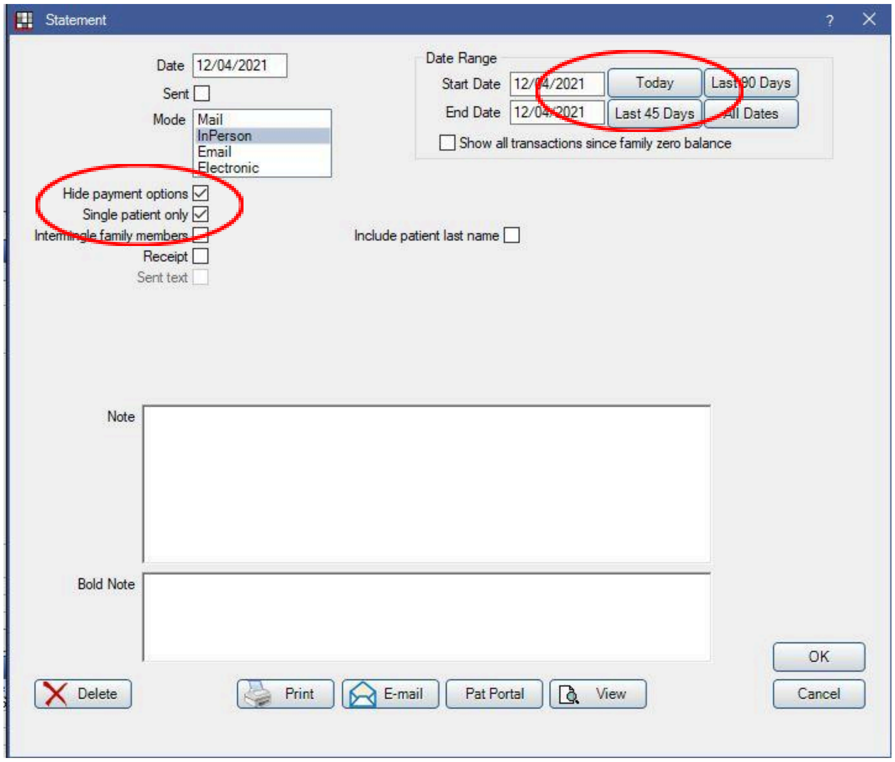
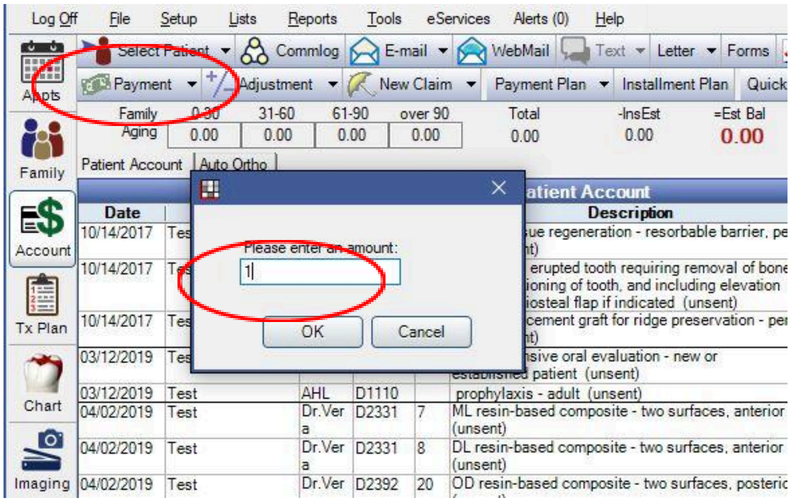
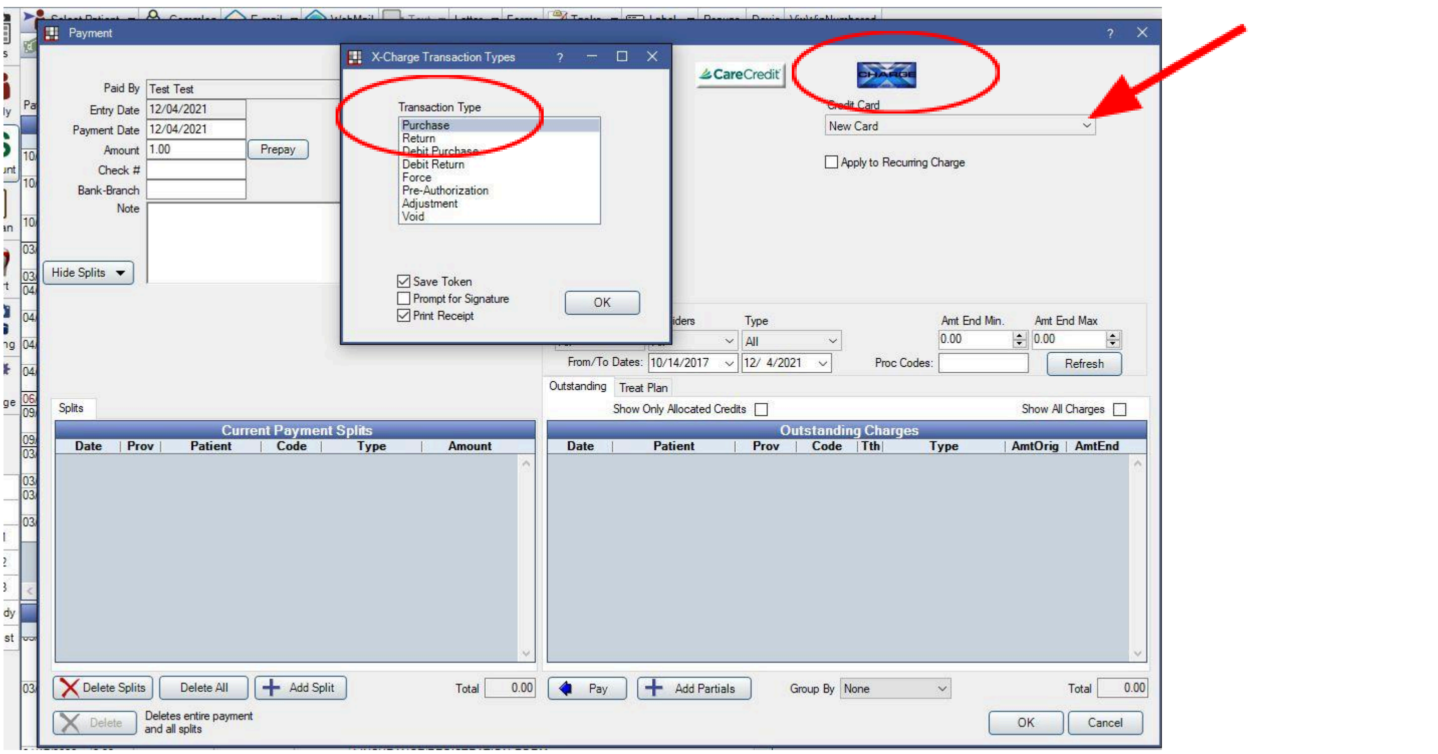


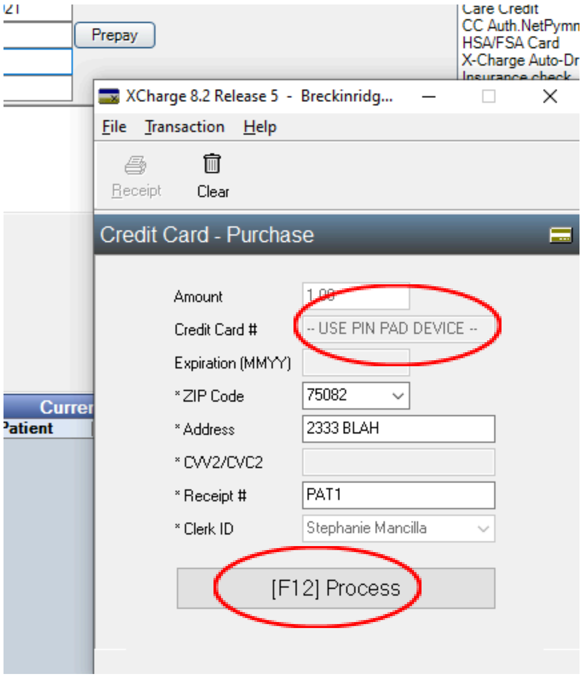
CREDIT CARD PAYMENTS

- 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.



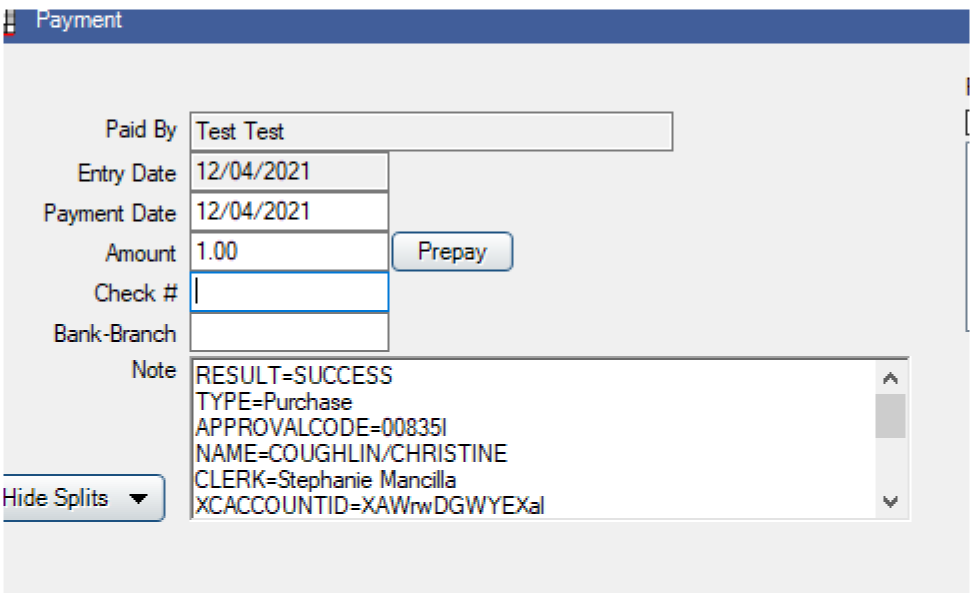
If you have ran a payment with this patient previously you will be able to access the card here.



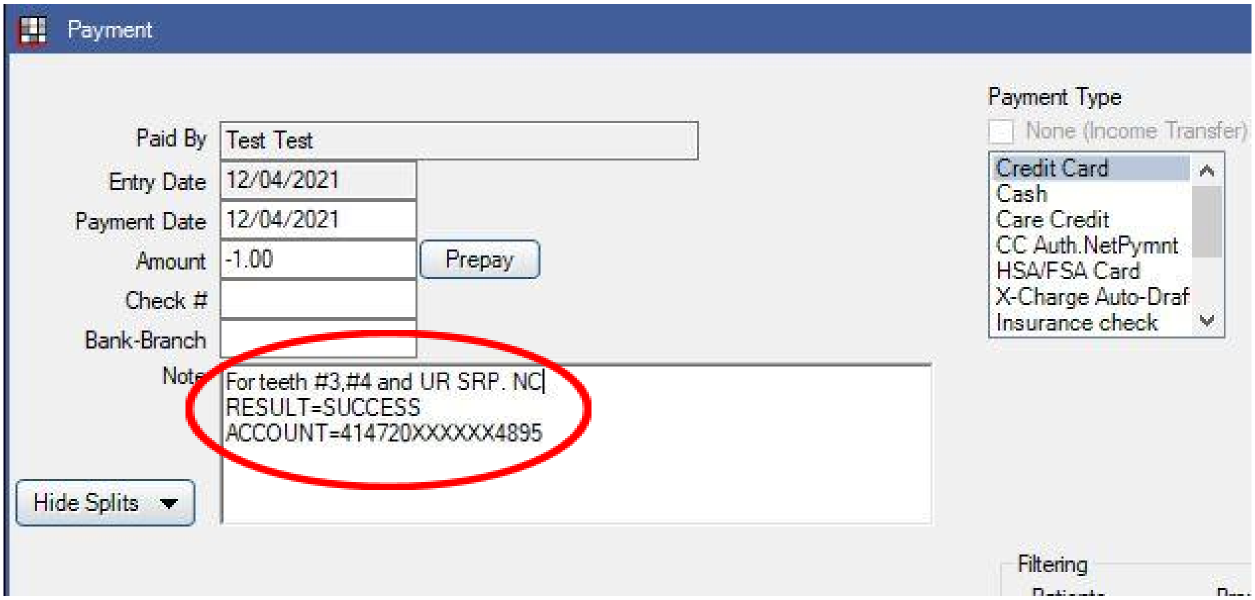


- If the card is not physically present you MUST HAVE THE PATIENT SIGN a printed copy of the receipt.

- You can use the pin pad or manually enter the card number on the XCharge screen shown above.

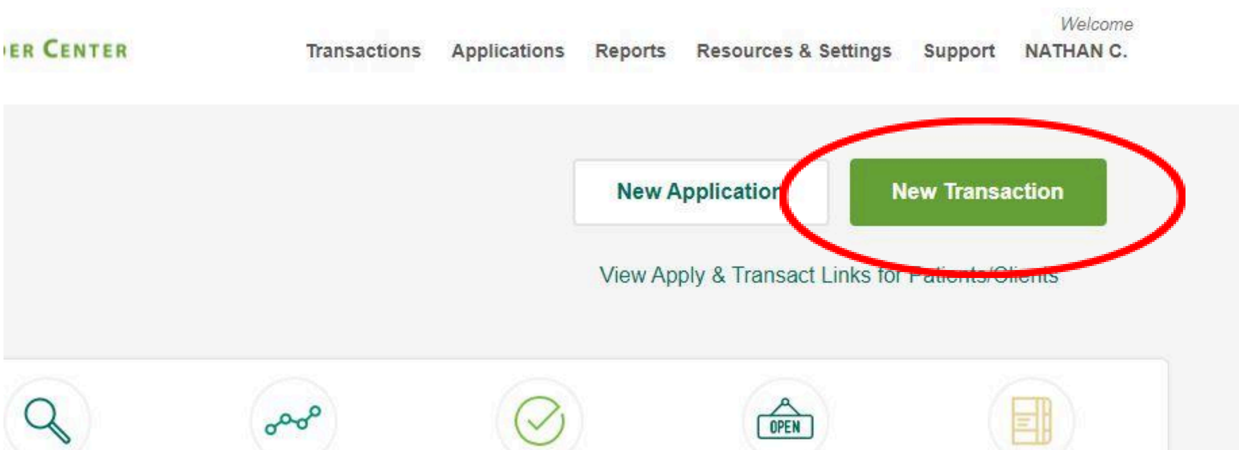


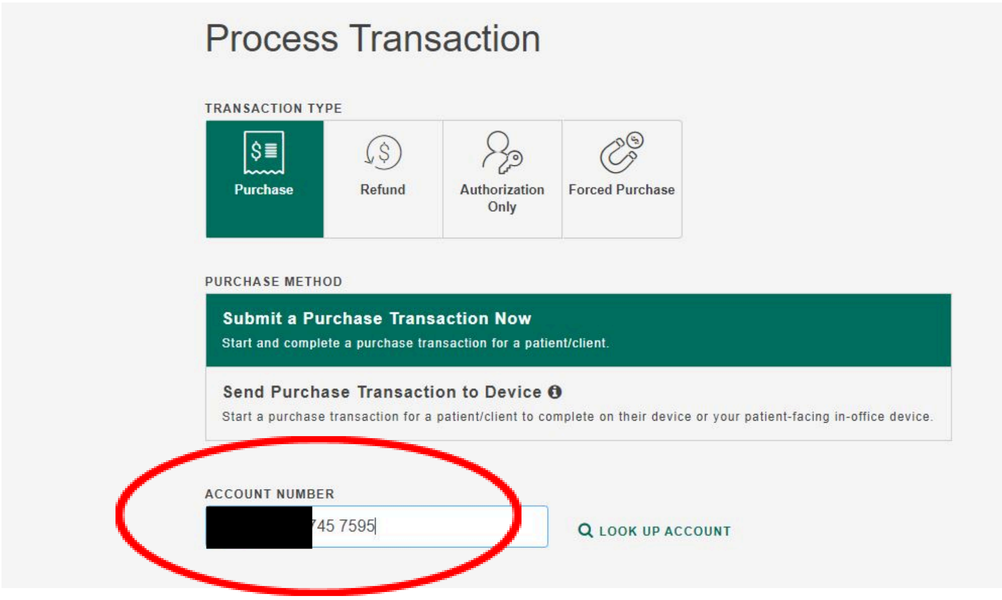
- Initially, all of the credit card information will populate in the “Note” section.
- Delete all of the notes except for the “RESULT=SUCCESS” and the “ACCOUNT” number. This will allow for easy access if a patient asks what credit card was used for that transaction.
    - In the notes section add what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



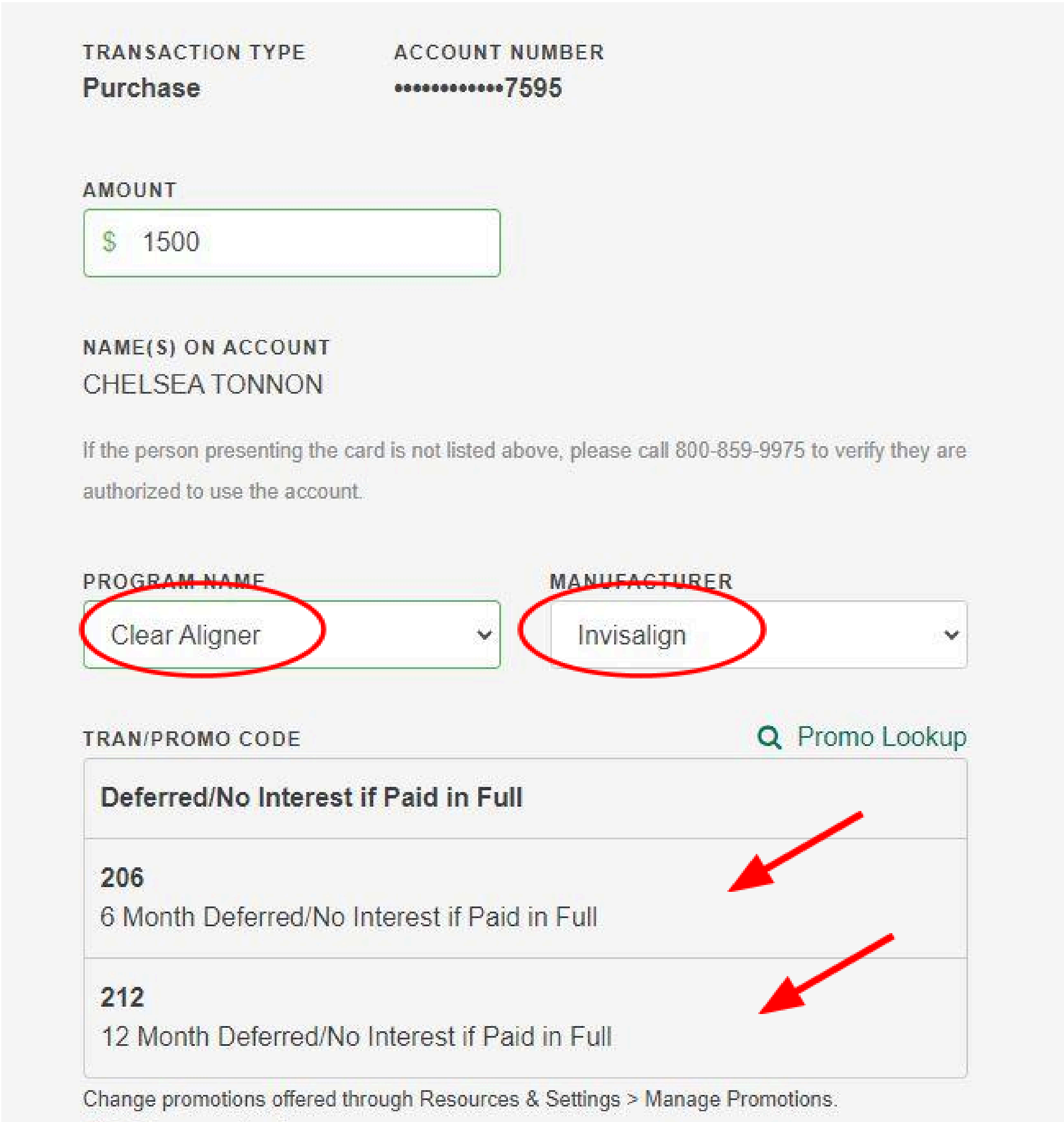
CARE CREDIT

- 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.

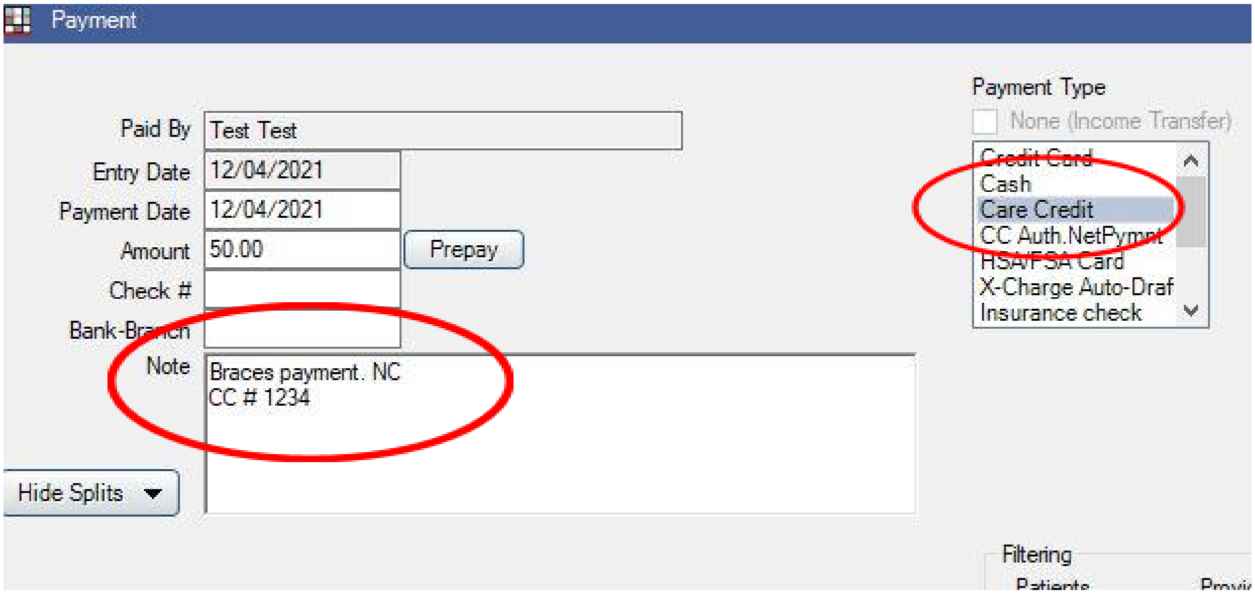




- “ACCOUNT NUMBER” is the patient’s CareCredit card number with no spaces.



- 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.

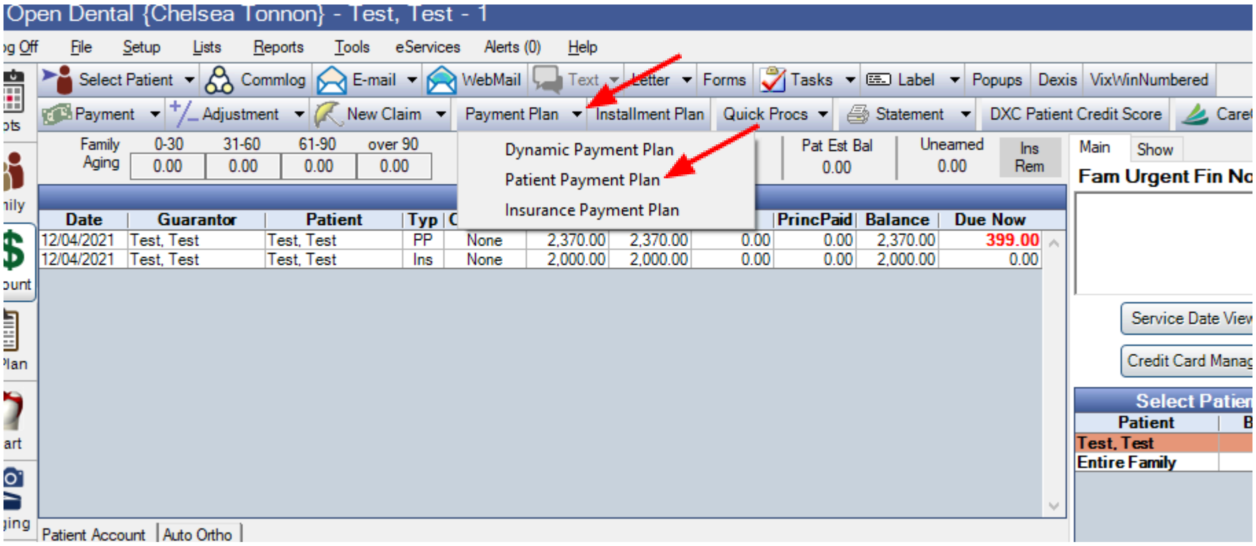
H. Payment Plans

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

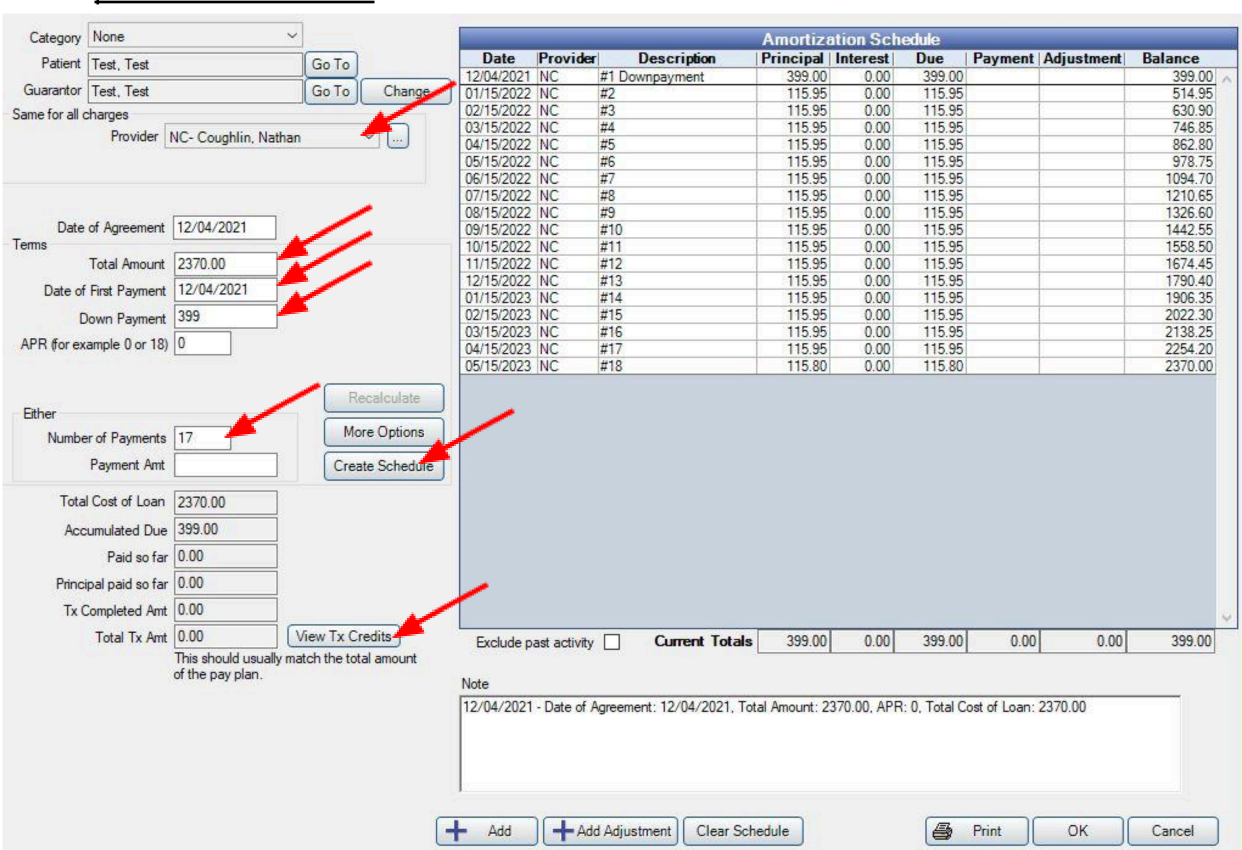
These are used for any treatment that requires greater than 2 payments. This includes patient payments and insurance payments.

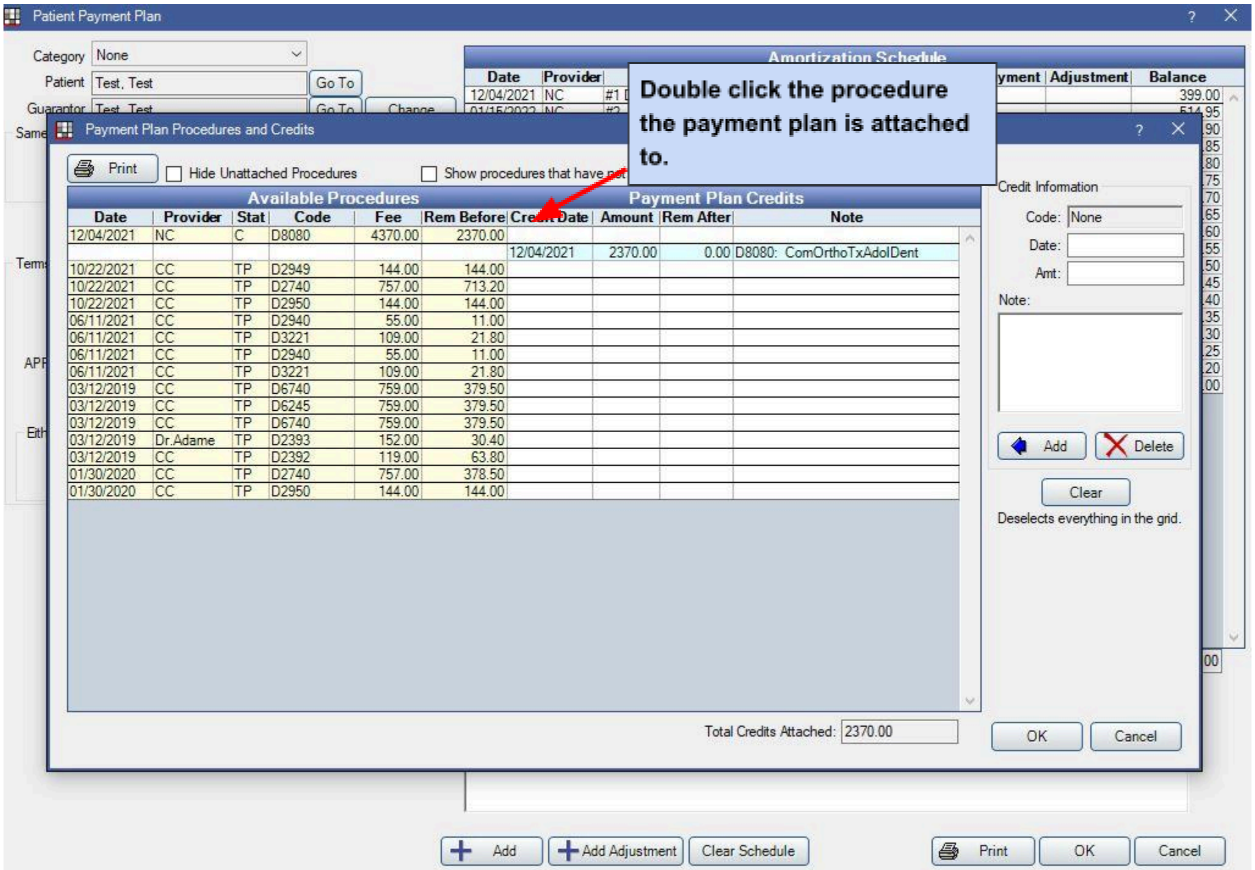
Patient Payment Plans Entry Into Open Dental

- 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”.



- 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.
- <u>You must attach this payment schedule to a particular code or else it will show that the patient has a balance</u> therefore click “View Tx Credits”



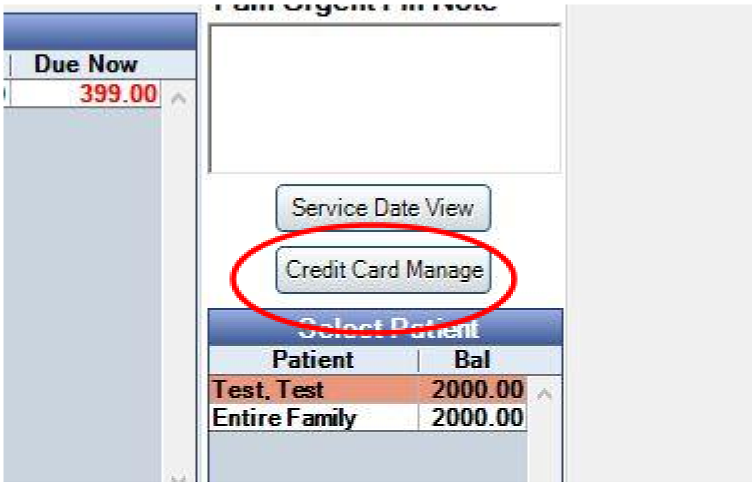


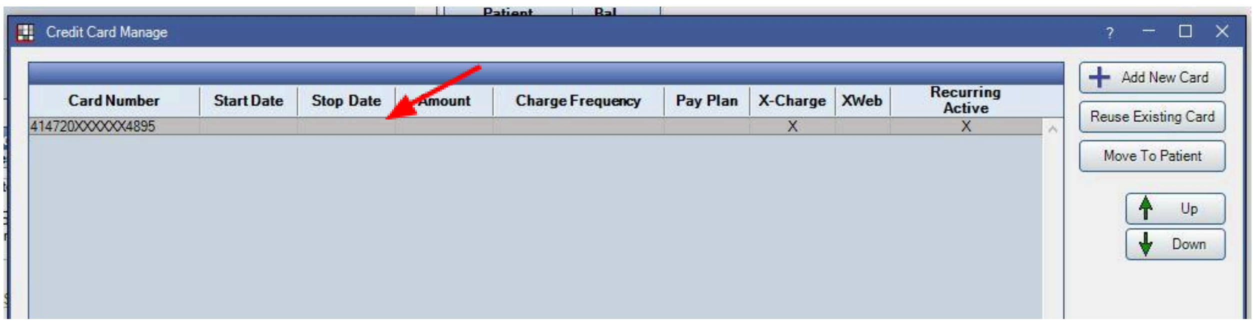
- Be sure to Print the payment plan, have the patient sign, and scan it into the chart. The patient can have the original receipt.

<u>Patient Payment Plans Entry Into XCharge</u>

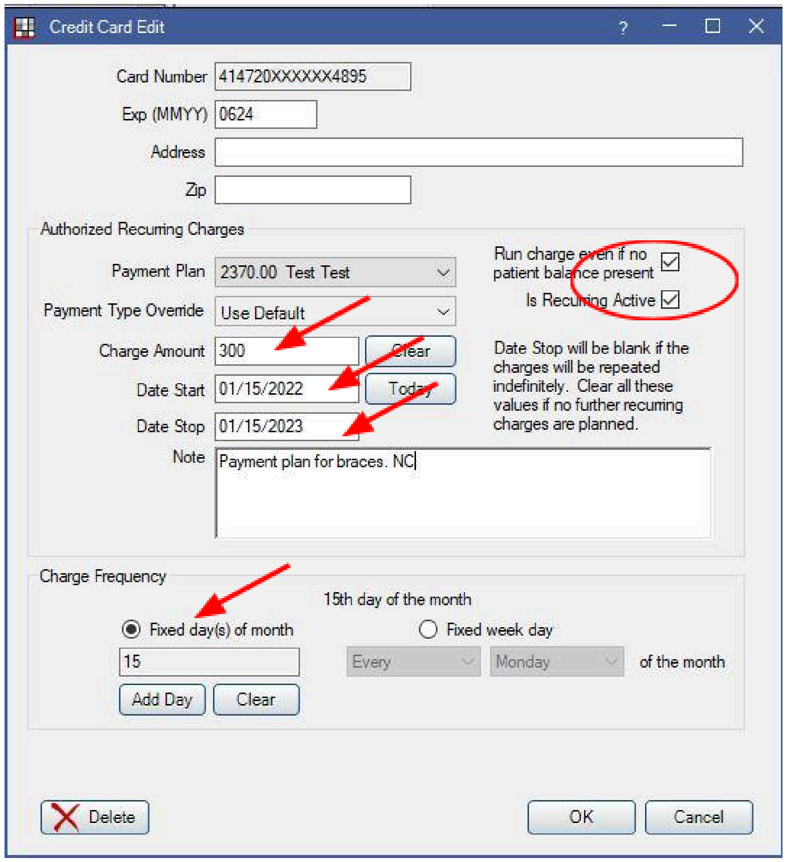
Once the patient payment plan has been created you must then create an XCharge payment plan. OpenDental will not automatically charge patients and that is why you must create a plan via XCharge (our credit card processor).

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



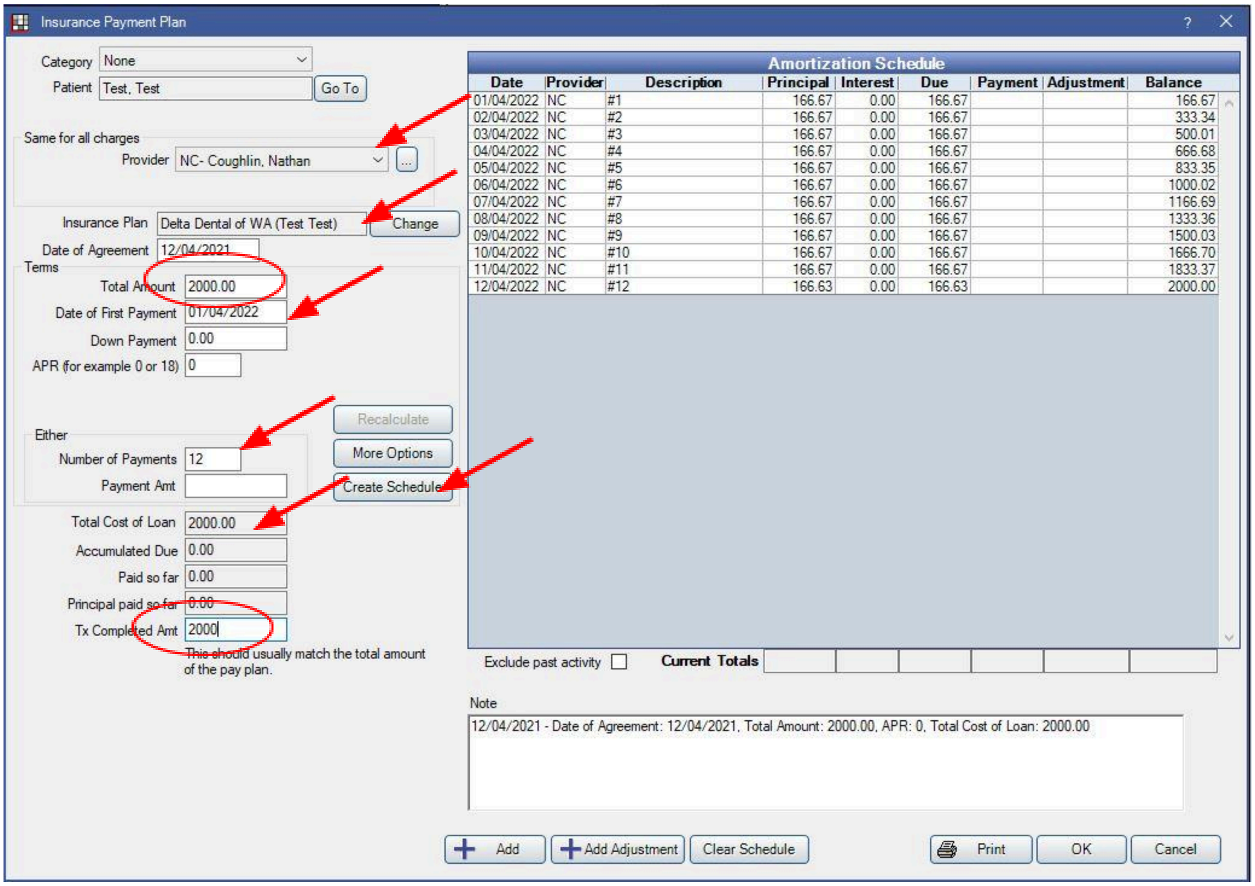


- Once the credit card is selected, enter the “Payment Plan”, “Charge Amount”, “Date Start” and “Date Stop”. In the note section write what the payment plan is for and your initials.
    - It is crucial you add the “Date Stop” or else the payment plan will run forever.
- Also, check off the “Run charge 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.



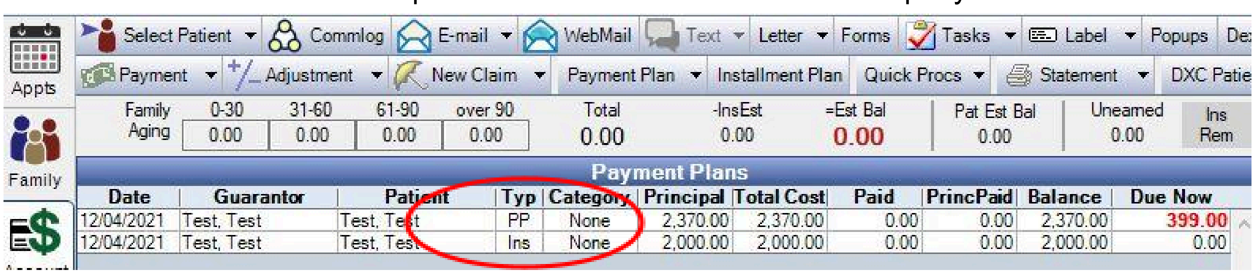
Insurance Payment Plans

- 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.



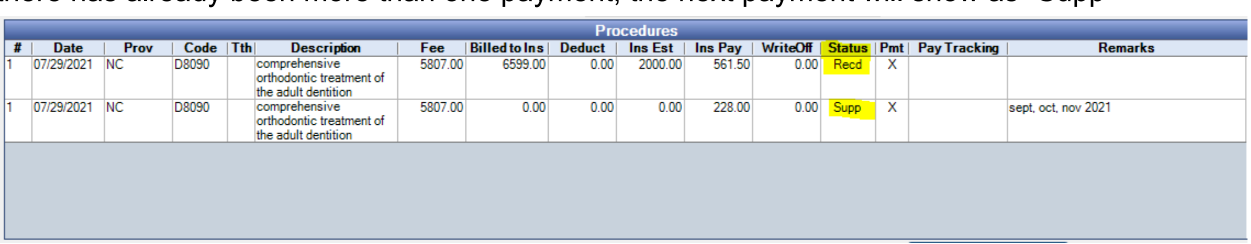
Date	Provider	Description	Principal	Interest	Due	Payment	Adjustment	Balance
01/04/2022	NC	#1	166.67	0.00	166.67			166.67
02/04/2022	NC	#2	166.67	0.00	166.67			333.34
03/04/2022	NC	#3	166.67	0.00	166.67			500.01
04/04/2022	NC	#4	166.67	0.00	166.67			666.68
05/04/2022	NC	#5	166.67	0.00	166.67			833.35
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

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.



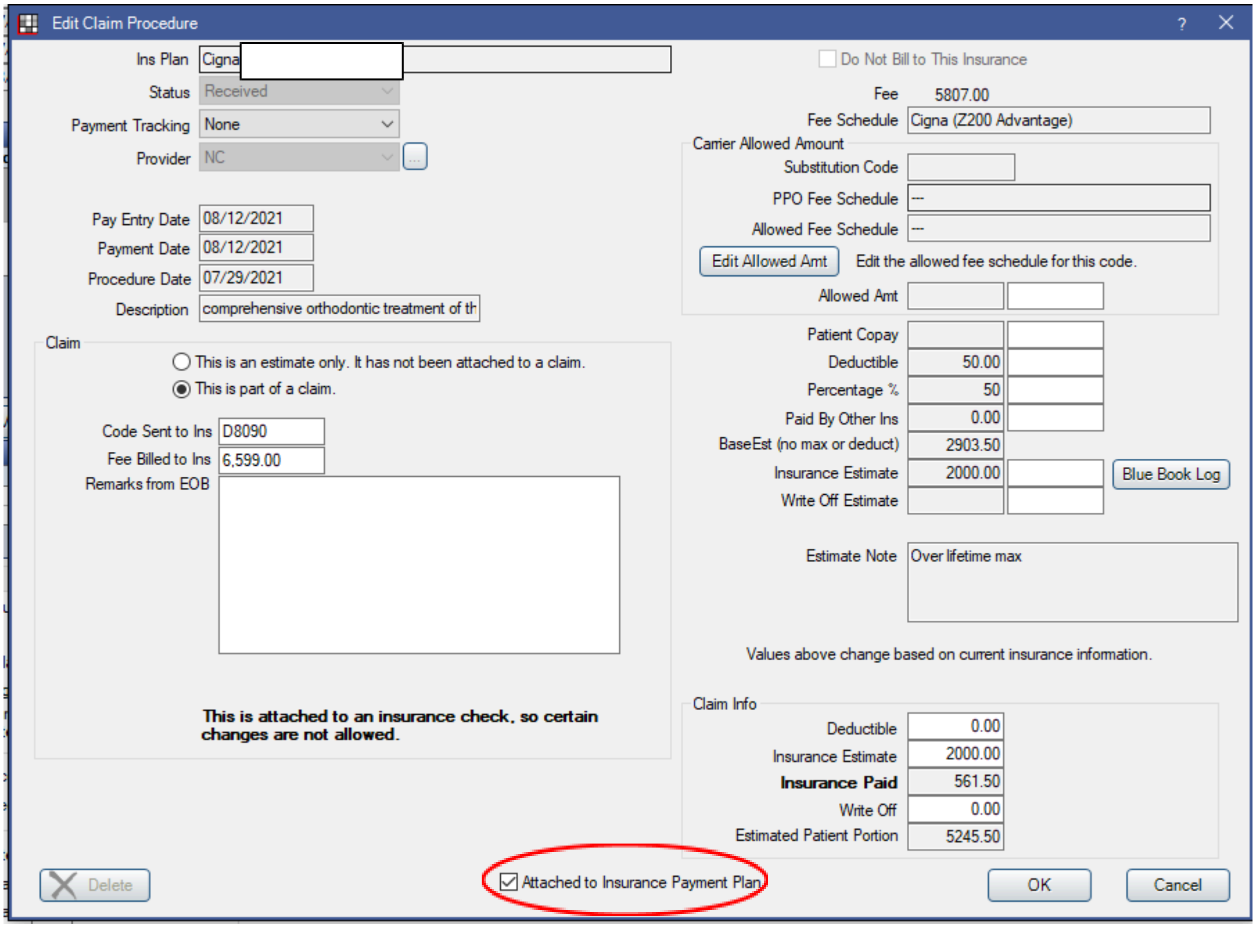
Date	Guarantor	Patient	Typ	Category	Principal	Total Cost	Paid	PrincPaid	Balance	Due Now
12/04/2021	Test, Test	Test, Test	PP	None	2,370.00	2,370.00	0.00	0.00	2,370.00	399.00
12/04/2021	Test, Test	Test, Test	Ins	None	2,000.00	2,000.00	0.00	0.00	2,000.00	0.00

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.



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:

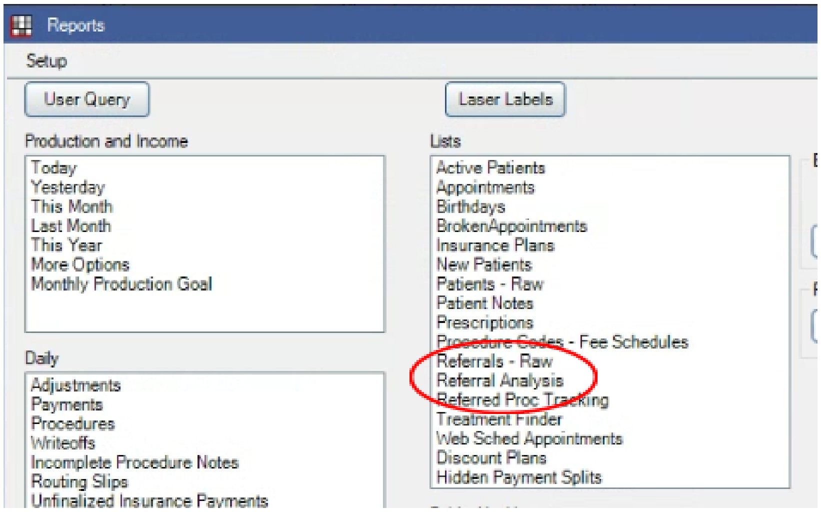
1. The patient makes an appointment and lighthouse immediately emails them the appointment time. The patients cannot confirm at this point, they are only notified of the appointment.
2. 2 days before their appointment, lighthouse will text or email the patients to confirm their appointment. If an office 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.

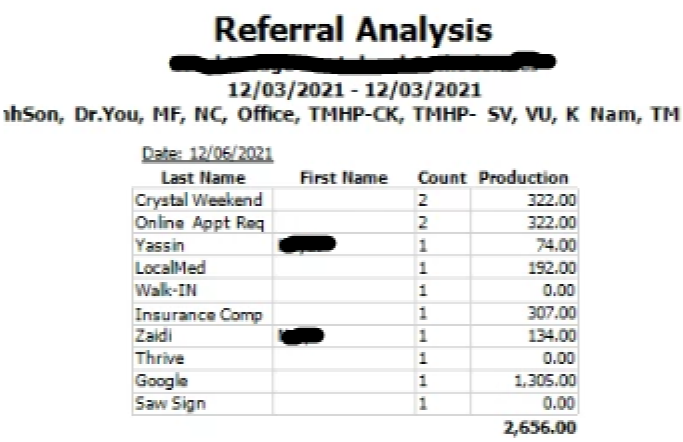
J.Schedule Review

- 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.





Referral Analysis

[redacted]

12/03/2021 - 12/03/2021

hSon, 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	[redacted]	1	74.00
LocalMed		1	192.00
Walk-IN		1	0.00
Insurance Comp		1	307.00
Zaidi	[redacted]	1	134.00
Thrive		1	0.00
Google		1	1,305.00
Saw Sign		1	0.00
			2,656.00

Month:						
MORNING 8:30-10 AM	**M**	**T**	**W**	**R**	**F**	**S**
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						
BEFORE LUNCH 10-1PM						
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						
EVENING 2-7 PM						
All unconfirmed appointmes 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 apopintments 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						
CLOSING						
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. <u>If you open up an email and do not respond to that patient the email will very likely get lost</u>. 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

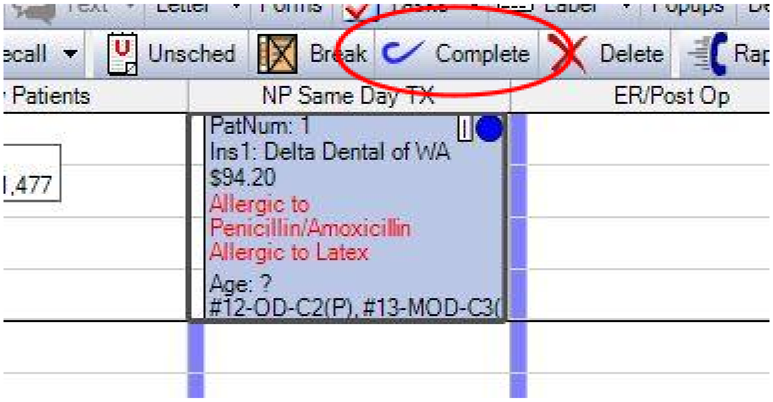
"Mrs. Smith, it looks like we need to refer you out to ________ for that tooth number ____. I have the referral information right here.

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.

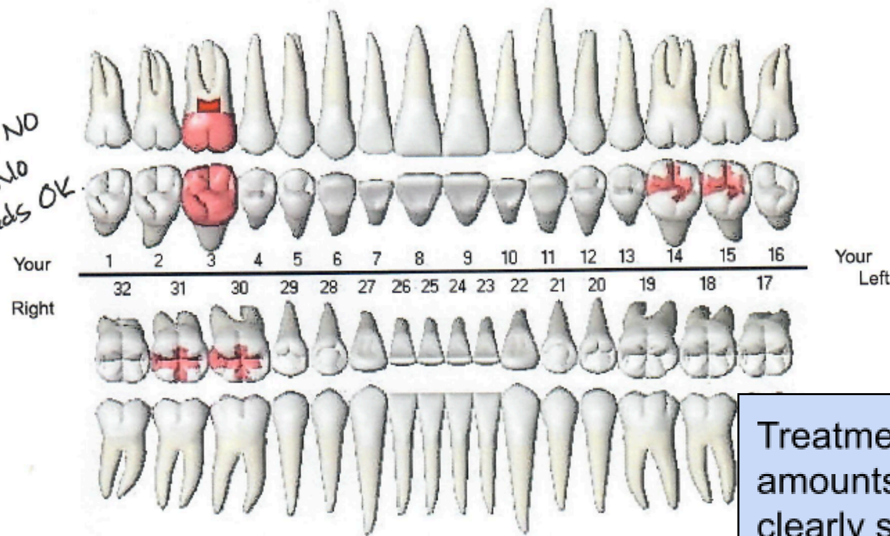
If a patient has treatment but is already maxed out pre-scheduling them for next year.

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.

12/04/2021

OP3
MTC= NO
WP= NO
4 Quads OK



Treatment discount amounts are clearly spelled out.

Existing Complete Referred Out Treatment Planned

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

Family Insurance Benefits

BenefitName	Primary	Secondary
Family Maximum		
Family Deductible		

$800 Total.

- 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

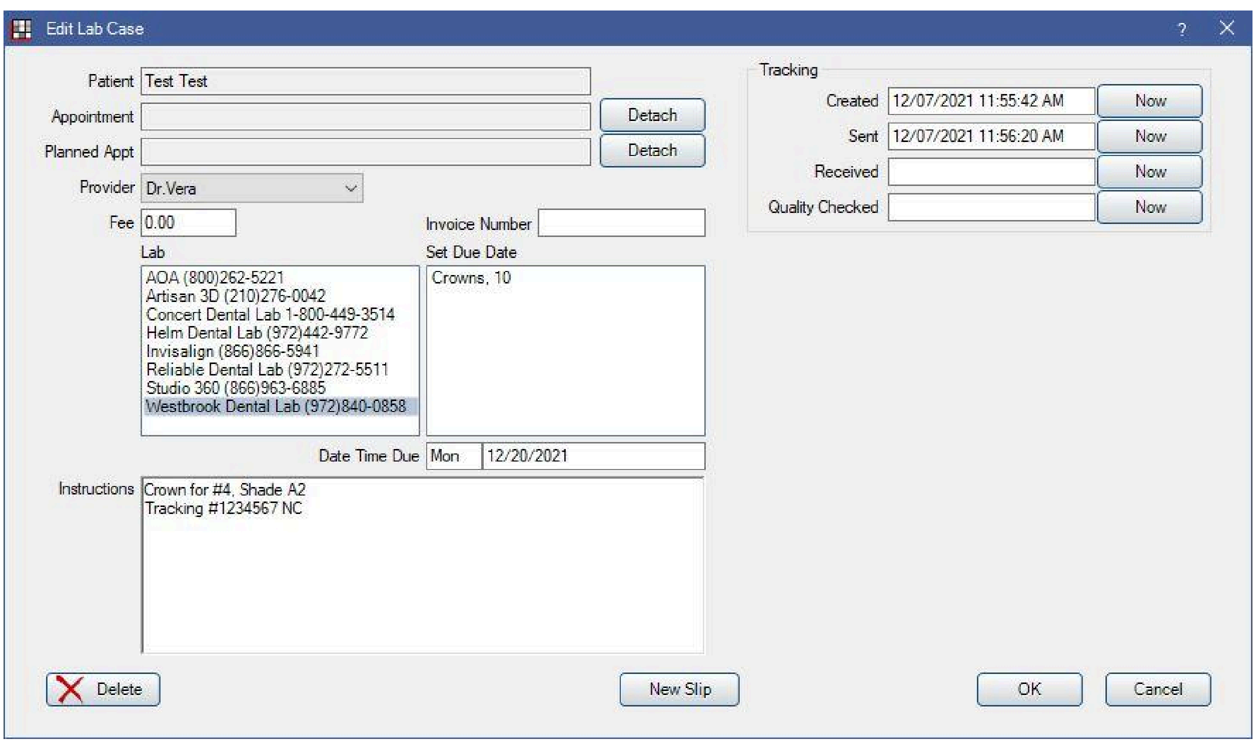
Properly accounting for lab cases is vital for a good patient experience. We must make sure cases are sent out promptly and immediately checked when they arrive.

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.

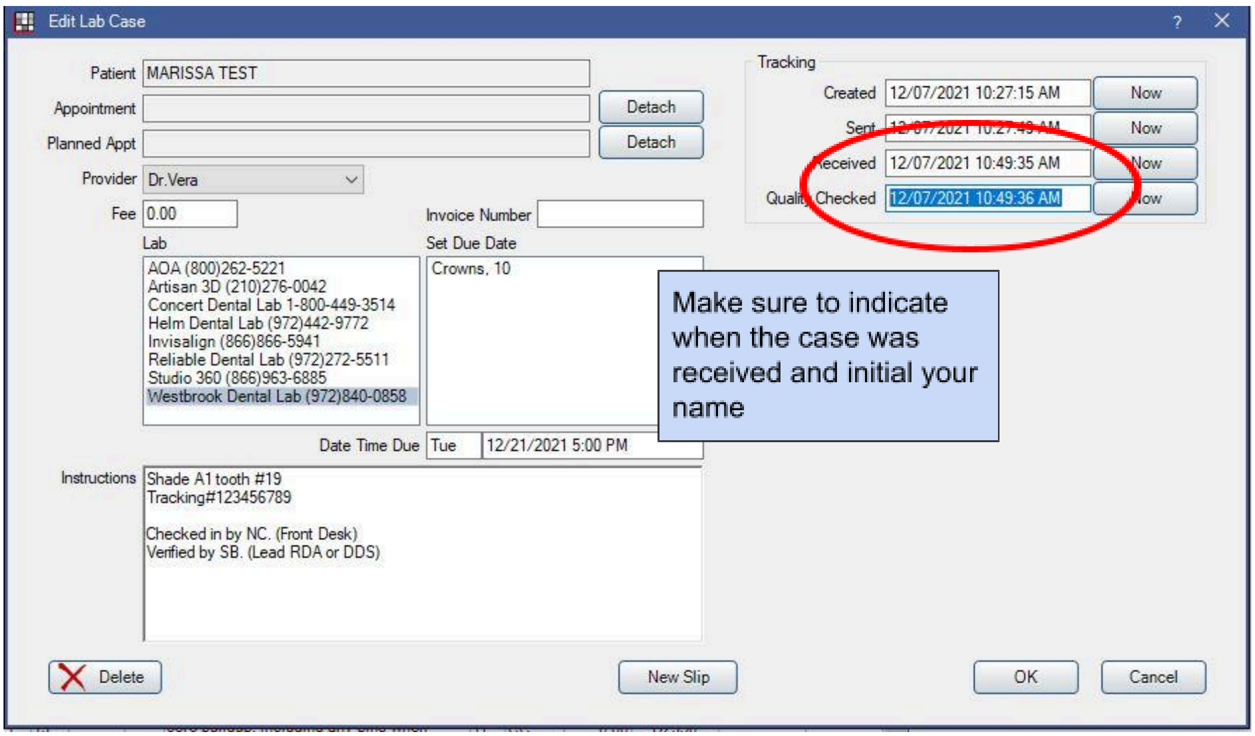


Lab Case Received

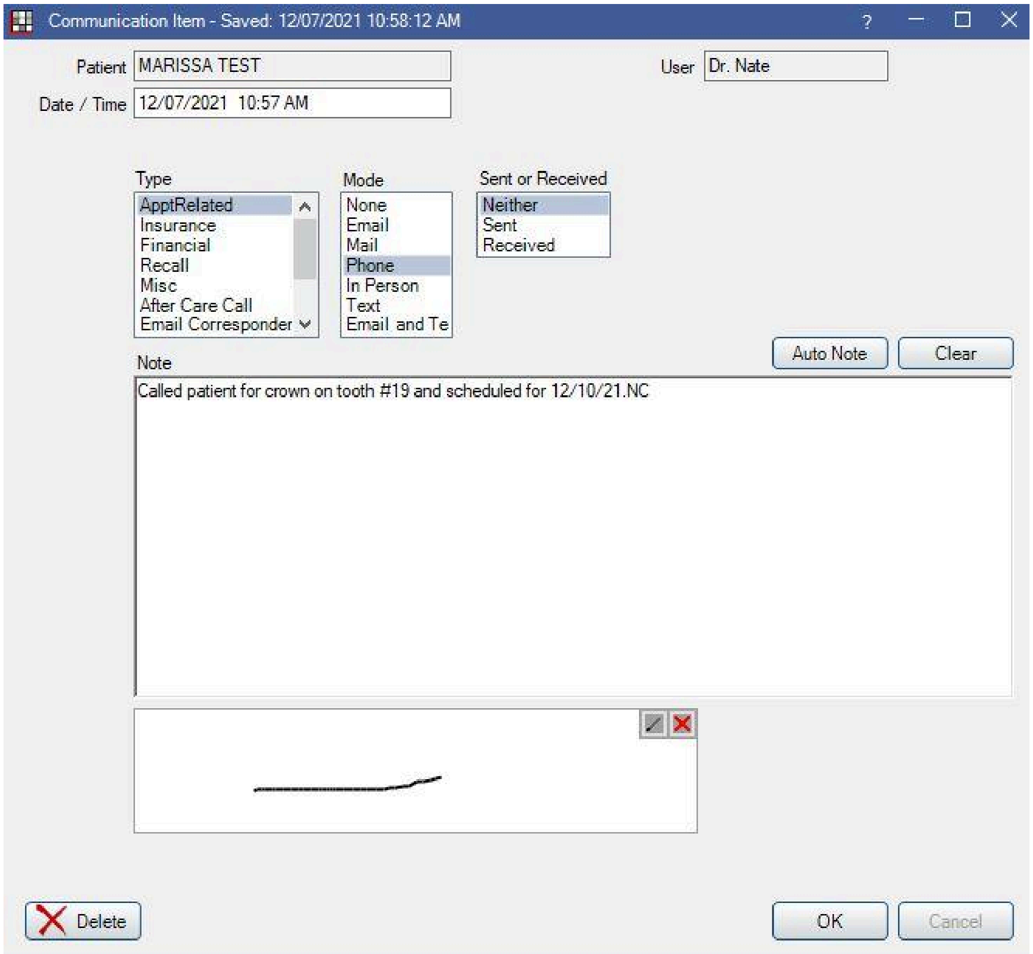
When the lab case is received you must check it in and call the patient to set an appointment if they do not already have one.

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.

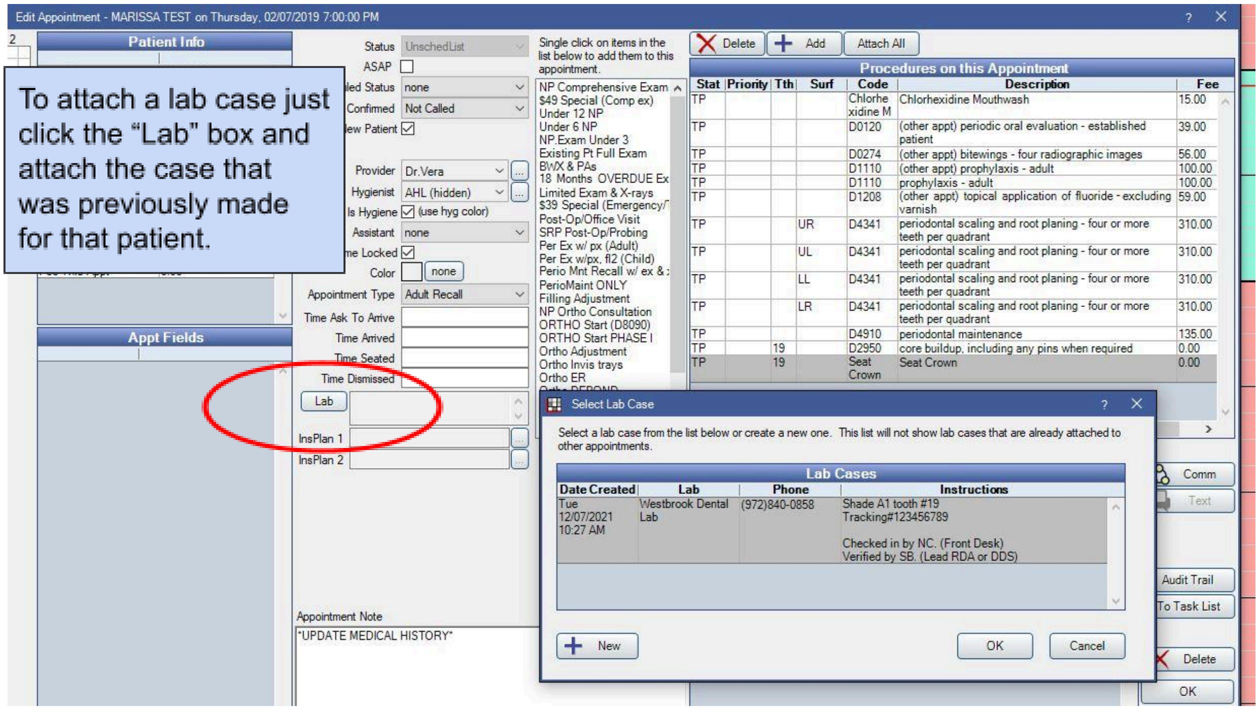
- Check the crown for the correct tooth number and shade.
- Go to the patient's chart and select “Lab”.
- Double click the lab case and enter the date “Received” and “Quality Checked” by RDA or dentist.



- 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.



- 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.



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.

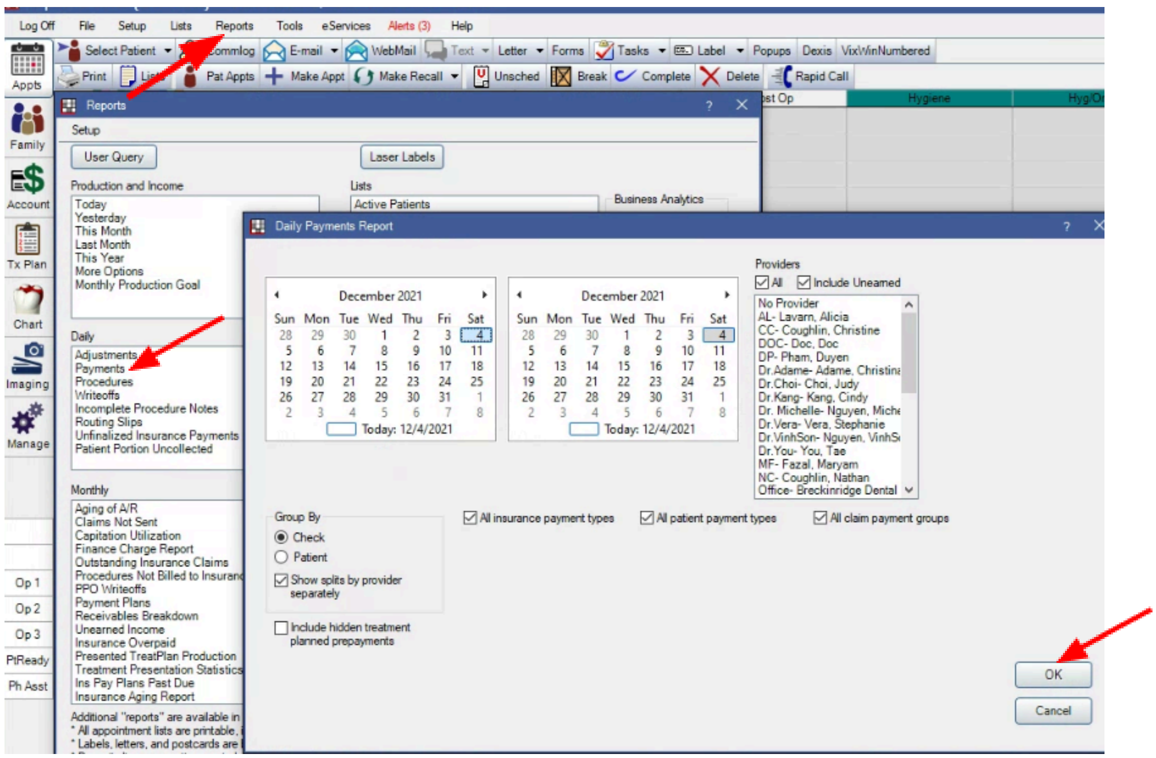
- Make sure every patient gets a copy of their treatment plan and that any referrals are explained properly.
- Ask patients if they need a school or work excuse for their visit.

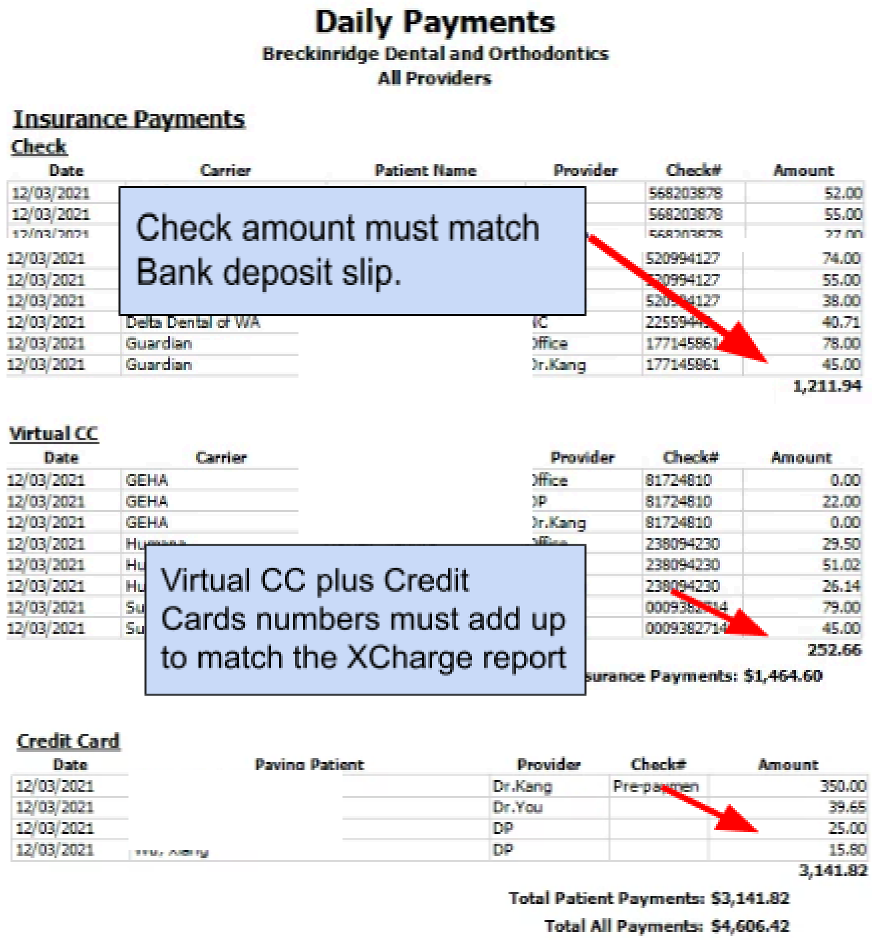
H. End of Day Duties

- 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	27.00
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		IC	225594[illegible]	40.71
12/03/2021	Guardian		Office	177145861	78.00
12/03/2021	Guardian		Dr.Kang	177145861	45.00
					1,211.94

Virtual CC

Date	Carrier	Provider	Check#	Amount
12/03/2021	GEHA	Office	81724810	0.00
12/03/2021	GEHA	DP	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
				252.66

surance Payments: $1,464.60

Credit Card

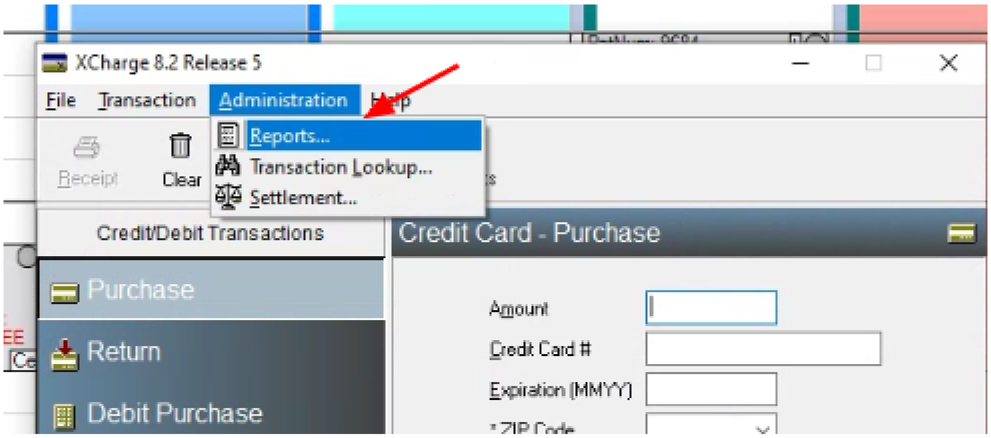
Date	Paying Patient	Provider	Check#	Amount
12/03/2021		Dr.Kang	Pre-paymen	350.00
12/03/2021		Dr.You		39.65
12/03/2021		DP		25.00
12/03/2021		DP		15.80
				3,141.82

Total Patient Payments: $3,141.82

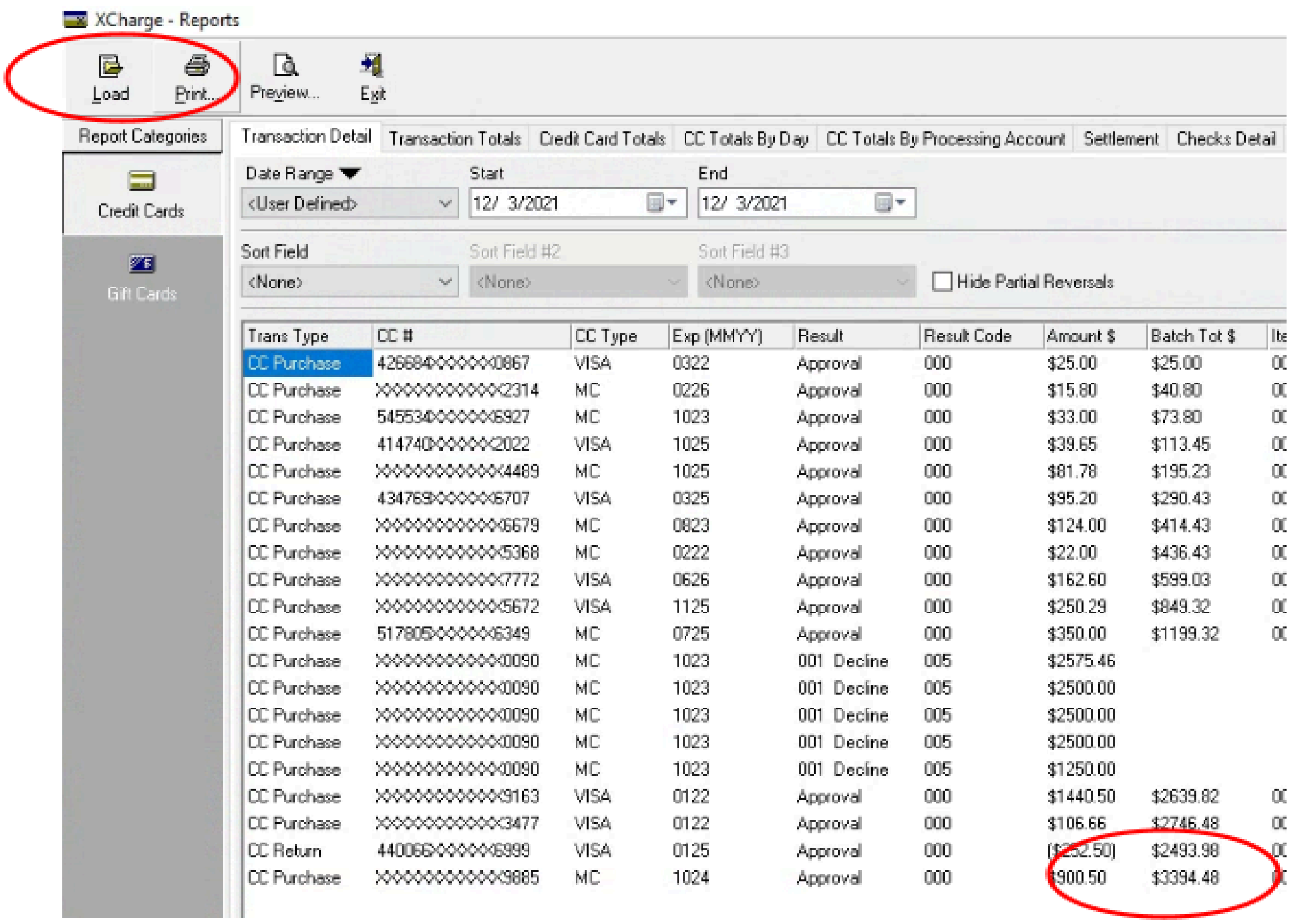
Total All Payments: $4,606.42

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:						
MORNING 8:30-10 AM	M	T	W	R	F	S
Checked Lightihouse 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						
BEFORE LUNCH 10-1PM						
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						
EVENING 2-7 PM						
All unconfirmed appointmes 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 apopintments 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						
CLOSING						
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 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.)

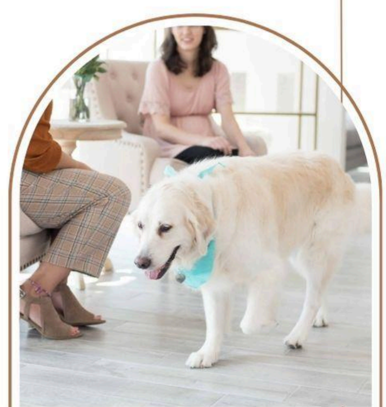
07

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.