



Training Manual  
Orthodontic Assistant

*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**

Let’s review the Thrive Standards

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 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.

7. **INTEGRITY.** We do everything with absolute integrity. We do not tolerate dishonesty or violation of HIPPA protocols.
8. **PROMPTNESS.** Promptness is an absolute requirement. No excuses. We want to be prepared ahead of time for our patients' arrival.
9. **TEAMWORK.** We always take the initiative to help our team succeed. If the bathroom needs to be cleaned, clean it. We never say, "that's not my job."
10. **EXPERIENCE.** We do everything in our power to deliver an awesome AWESOME experience for our patients EVERY time. Every team member asks the patient, "How was your experience?" (3 times total)
11. **ASSURANCE.** We comfort dental fears with loving care. We reassure our patients that they are in the best hands. We constantly check in with our patients, showing concern for their comfort and well-being.
12. **COMMUNITY.** We build strong and healthy communities. We serve our communities with love and generosity. Each of us represents the Thrive name. Tell everyone about us!
13. **GROWTH.** Commit to constant growth and learning. At Thrive, we empower each team member to become the servant leader they were created to be.
14. **FUN.** Have fun and dream big!

# 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.

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## **A. Job Description & Daily Expectations**

Thrive assistants are the most talented, friendliest, and most professional assistants in the industry. The RDA role at Thrive Dental & Orthodontics is as multifaceted as it is demanding, and requires a strong, focused, quick individual that is able to multitask without compromising the quality of their work.

**We expect that each employee has a “Whatever It Takes” mentality. Your job is never a “9 to 5” job.** Every day, you must come to work “dressed for success”. Everyone is expected to do what it takes to support the success of the entire practice and have a constant awareness of daily goals. Enthusiasm is a top priority for your job. We are a busy office and everyone is expected to operate in a busy and efficient manner. High energy and a positive attitude are a must for you to be successful at your position. Although you perform your job description 90% of the time, you know other positions in the office and help out when needed. Everyone should always have a patient, friendly attitude. All patient encounters should be friendly and happy. When a patient is unhappy or dissatisfied with some aspect of our service, it is your responsibility to do what is necessary to satisfy the patient. Show the patient that you care.

- Objective – To **assist the doctor** in performing procedures or treatment and to make the patient as comfortable as possible during treatment.
- Arrive to work a minimum of 30 minutes prior to the first scheduled patient.
- Complete all Duties on the daily checklist at appropriate times (Morning, before lunch and end of day)
- Know what is scheduled for the day. At all times, look for opportunities to work in procedures to reach goal.
- Review the schedule one day in advance. **Check that all lab cases are ready** and be prepared for any special circumstances on the schedule. Be 100% ready for all procedures scheduled for the next day.
- Greet each patient by name and seat the patient. Introduce yourself to patients. Display a friendly and upbeat attitude. **(Use your SCRIPTS)**
- Make the patient as comfortable as possible. Talk to them. Place bib, offer headphones, TV, etc. Ensure the patient is comfortable and relaxed. **(SCRIPTS)**
- Set up trays with appropriate instruments for each procedure.
- Stay current with license, certifications for CPR, N2O, x-rays, etc.
- Stock operatories with necessary supplies and maintain inventories. Never allow a room to run out of necessary supplies. **(Lead RDA’s main responsibility)**
- Sterilize instruments and trays. (See **Sterilization Protocol**)
- Assist in all dental procedures.
- Write a complete description of any procedure you performed in the patient’s chart, with your initials and the date. (Notes **MUST** be done before leaving for the day. Lead will then check at the end of the day to ensure notes were done)
- Chart the treatment plan as the doctor calls out the recommendations, print treatment plan with appropriate insurance information written on it and announce it on the ear (See **Treatment Planning / Printing**)
- Explain, as necessary, dental treatment or procedures to the patient when questions are asked. Stress the benefits to the patient. Use as much patient education as possible. (X rays, intra-oral pictures, picture books etc.)

- Take excellent impressions using correct H2O to powder ratios using snap stone. Patients should leave with their whitening trays the same day.
  - Make excellent temporaries. Expectation is that all temporaries make it through until the permanent is placed. Always explain post-op / expectations of the temporary to your patient.
  - Maintain the chemicals in the autoclave, and cold sterile.
  - Maximize the production scheduled for the day by keeping a watch on the treatment plan to see that all possible work is completed that day.
  - Keep the operatories on time so that the patients are seen on time. If running behind, the chair side assistant will notify the front desk that will in turn notify the next patient.
- (Communication is the key)**
- Help out in another area of the office during down time.
  - Turn on and off daily: x-ray machine(s), air compressor, lights, water, nitrous and oxygen tanks, suction system, etc.
  - Set up treatment rooms.
  - Coordinate and record lab cases (See **Creating Lab Cases**)
  - Oil hand pieces properly after each use.
  - Empty suction traps weekly.
  - Perform weekly maintenance tasks.
  - Disinfect operatories after each patient.
  - Use gloves, mask, and protective eyewear with every patient. Take necessary additional precautions with known infectious patients.
  - Maintain and clean sterilization lab. ( Lab **MUST** be cleaned at the end of day )
  - Combine efficiency, productivity, and caring for patients in all actions.
  - Give post-op instructions at the end of each procedure, make sure your patient understands what was done and knows what to expect from their procedure. Give the patient printed post- op information for extractions.
  - Order inventory and supplies. **We do not run out of supplies and/or materials.** Saying “its on backorder” is unacceptable. You will be written up if you run out of supplies/materials. Our dental representatives/Regional RDA will get a material for us at another local dental office if needed.
  - Put supplies away as they are delivered each day. They are checked in according to the invoice and put away in a very orderly way.
  - Attend continuing education.
  - Stay current on expanded duties.
  - **Encourage patient referrals.** “Gosh, Mr. Coughlin, you are so friendly and easy to work with! If you have any friends or family members like you, please send them our way.”
  - Cross train in other areas of the office.
  - Maintain a spotless work environment throughout the day. No overflowing trash cans, paper or trash on the floor, etc.
  - Maintain all dental equipment. Call appropriate company for repairs or questions. (See **Equipment Repair / Replacement Guidelines**)
  - **Talk** to patients during their procedures to help them feel comfortable. It is your responsibility to make the patient feel at ease.
  - Learn how to do everything the Thrive way. This includes seating patients properly, dismissing patients properly, using **excellent verbal skills**, etc. We expect a lot out of our clinical assistants. We especially require **efficiency** in all areas of your work.



We believe in investing a little more on the front end of any given task to get it “perfect” as opposed to doing the task sloppily and having to invest ten times more time later on to clean it up.

**Examples:**

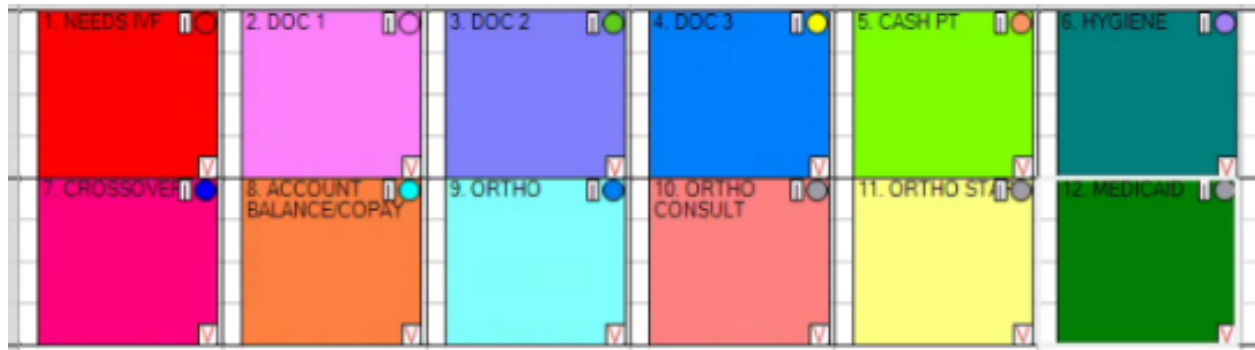
- Data entry, including patient notes must be filled out completely and accurately.
- Our doctors do all procedures the best they can possibly be done the first time. Redo's are inefficient, unproductive, costly, etc.
- Assistants will learn the proper ways of taking impressions for whitening trays, night guards, etc. Having the patient return to the office for retakes is extremely poor customer service.
- We want every task that we perform to be excellent, efficient, and reflect high expertise and skill. We want to handle patients, coworkers, insurance companies, etc. in a way that reflects the pride we take in our work.

**B. Infection Control**

- Review full medical history on each patient
- Treat all patients as if they were infectious
- Be vaccinated against Hepatitis B
- Use an antiseptic hand wash
- Wear a disposable mask or face shield
- Wear disposable gloves any time you touch mucous membranes
- Wear protective eyewear
- Wear a disposable gown or lab coat when splatter is expected
- Wear clinical attire at all times
- Put needles and other sharps in a puncture resistant container
- Use sterilized hand pieces
- Use an ultrasonic cleaner instead of hand scrubbing instruments
- Package instruments correctly for sterilization
- Monitor the sterilizer with appropriate spore tests weekly
- Use glutaraldehyde for items that cannot be heat sterilized for the appropriate time recommended
- Use an appropriate surface pre-cleaner
- Use an appropriate surface disinfectant for the time recommended by the manufacturer
- Use surface covers
- Have an adequate waste disposal system according to local regulations

## **C. Confirmation status / Blockouts**

Every office has the same confirmation colors so it is important to familiarize yourself with them.



### **Color of the Confirmation Button**

1. Unconfirmed/Not Called
2. Lighthouse Confirmed
3. Office Confirmed
4. Left Voicemail
5. Arrived
6. Ready to be seated
7. In Room
8. Treatment Plan Ready
9. Texted
10. Appt Completed

### **Color of the Appointment**

1. Needs Insurance to be verified
2. Doctor #1
3. Doctor #2
4. Doctor #4
5. No insurance/cash patient
6. Hygiene patient
7. Cross over patient
8. Patient has a balance due
9. Ortho Patient
10. Ortho Consult
11. Ortho Start
12. Medicaid Patient

## **D. Consults**

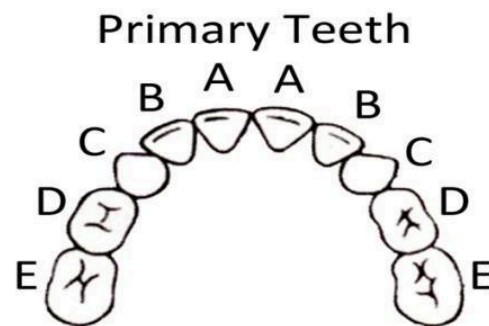
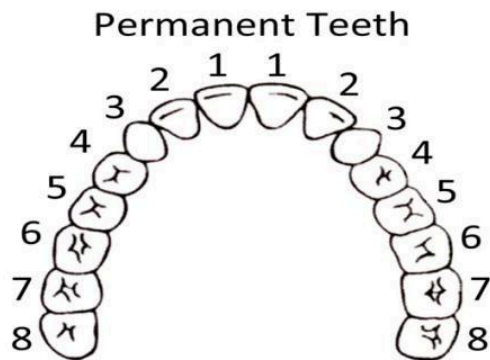
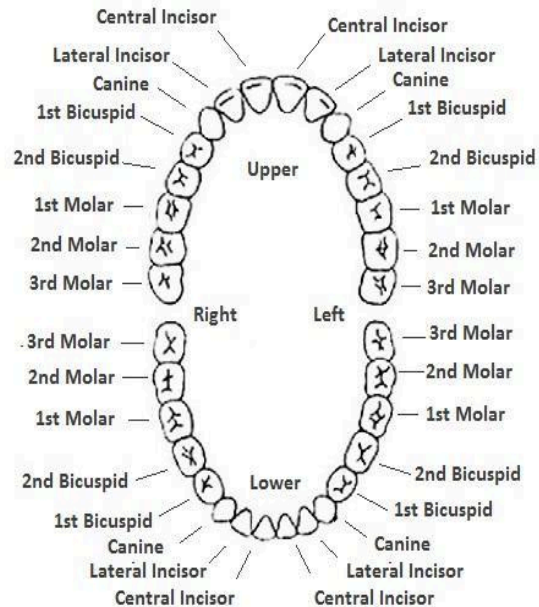
All patients need a Panorex and Ceph radiograph. If panorex is older than 6 months and the patient is less than 18 years old, take a new one.

For consultations the doctor needs a mirror and gloves.



## Permanent and Primary Dentition

As an orthodontic assistant you will need to learn how to count the teeth from the central incisor all the way to the 3<sup>rd</sup> molar. The charts below will show you how we count and number our teeth.



## E. Appointment lengths

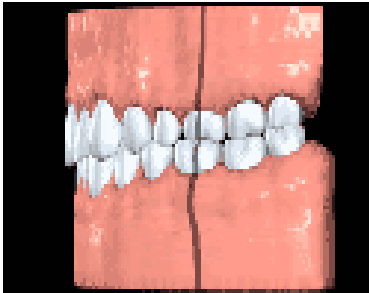
Bonding upper & lower= 60mins  
Records/Bond upper= 60 mins  
Records= 30mins  
Adjustment = 30mins  
Debond/Records= 1hr  
Deliver Appliance= 1hr  
LBR (lingual bonded retainer) = 1hr  
Deliver Retainer= 15mins  
Separators= 15mins

## **F. Molar Classification:**

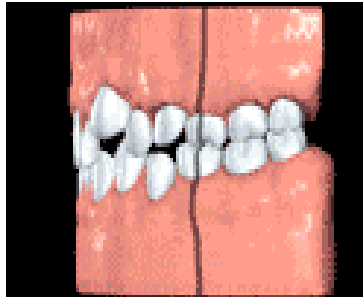
### **Class I:**

Class I is a normal relationship between the upper teeth, lower teeth and jaws or balanced bite.

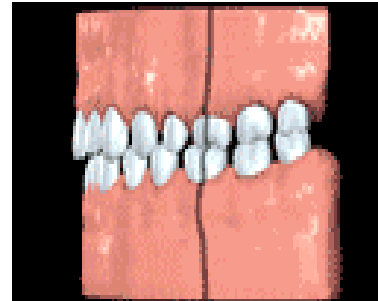
Normal



Crowding



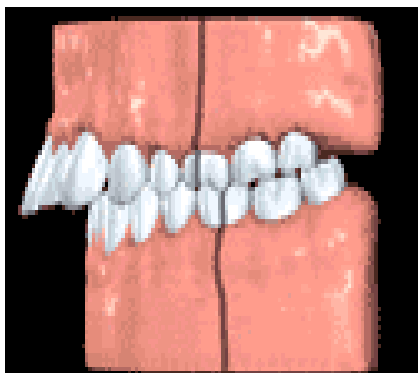
Spacing



### **Class II:**

Class II is where the lower first molar is posterior (or more towards the back of the mouth) than the upper first molar. In this abnormal relationship, the upper front teeth and jaw project further forward than the lower teeth and jaw. There is a convex appearance in profile with a receding chin and lower lip.

#### **Division 1**



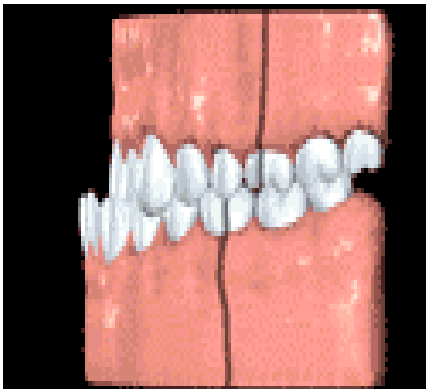
#### **Division 2**



### **Class III:**

Class III is where the lower first molar is anterior (or more towards the front of the mouth) than the upper first molar. In this abnormal relationship, the lower teeth and jaw project further forward than the upper teeth and jaws. There is a concave appearance in profile with a prominent chin.

Skeleton



Dental



### **G.Records:**

**Xrays:** All our patients will need x-rays. Our x-rays consist of a Panoramic and Cephalometric. Before we start any treatment on the patient they will have to get full records that consist of those x-rays and photos.

**Panoramic Radiograph**

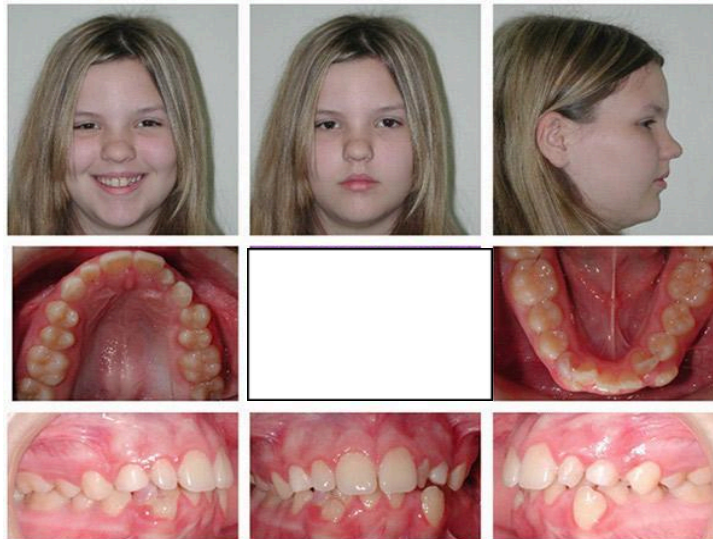


## Cephalometric Radiograph



## Photographs

All patients are required to have photos before and after treatment. You take a total of 8 pictures. You will need cheek retractors and a mirror!



## Patient Starter Ortho Kits

When a patient first gets their braces on they will get a patient kit! You as an assistant will need to go over everything in the kit and explain to the patient how to use everything in the kit. I would also recommend telling the patient that “super floss” is easier floss to use then the one in the kit!



## Patient Instructions:

When a patient first gets their braces there will always be instructions to hand out! You will need to go over the instructions with the patient and parent if the patient is younger than 11 years old.





## Brushing

You will show each patient how to brush their teeth with their toothbrush in their patient kit! Make sure you explain to them that it is very important to keep their teeth clean! Also they can still get their 6month cleaning!



## SEPARATORS AKA SPACERS

Not every patient will get separators, they will only get separators if they need an appliance or the doctor wants to band the patient at the next appointment. So you will only give out instructions about separators if the patient needs

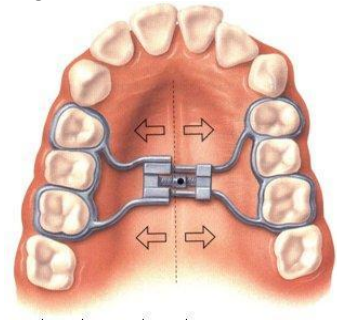
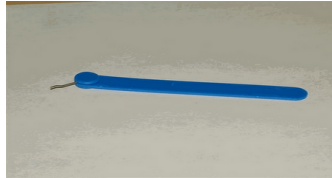
## H. APPLIANCES:

This is the instruction pamphlet that you will give to the patient if they just got their appliance put in! Not every appliance will be the same but this shows them how to take care of it and what the appliance is doing.



## **TYPES OF APPLIANCES:**

**RPE (Expander)** - Widen the upper jaw so that the bottom and upper teeth will fit together better. Use of a palatal expander is most often followed by braces to straighten out all the teeth now that room has been created. A key will go with this expander.



**Habit Reminder (Tongue Crib)** - A tongue crib is a dental appliance inserted behind the top teeth. This is used to keep the patient from constantly pushing at the front teeth with the tongue, which causes jaw and tooth alignment problems.



**MARA-** The MARA is designed to be a simple, durable Class II corrector. The appliance is generally anchored to the patient's first molars with stainless steel crowns. The advantages of this appliance include reliability and a shortened treatment time. The upper "elbows" may be removed by the clinician or staff, facilitating comfort and advancement adjustments. Patients adapt to the MARA in a few days and sore spots are minimal. The appliance may be advanced unilaterally or bilaterally and works well in skeletal midline asymmetry cases. Upper and lower arch wire tubes are standard, allowing the clinician the option of using fixed mechanics during the MARA therapy. A lower lingual arch is also a standard element of the appliance. Other popular options include expansion screws, habit devices, Trans palatal bars, crown removal holes and ligation modifications.



**HAWLEY RETAINER-** A metal wire that typically surrounds the six anterior teeth and keeps them in place. The advantage of this type of retainer is that the metal wires can be adjusted to finish treatment and continue minor movement of the anterior teeth as needed.



**ESSIX RETAINER-** This device is designed to prevent the teeth from moving or shifting; it will not move the teeth. Essix retainers are better looking and more effective than the traditional wire retainers.

\*The Essix Retainer is used most of the time.



## **I.Elastics / Rubber Bands**

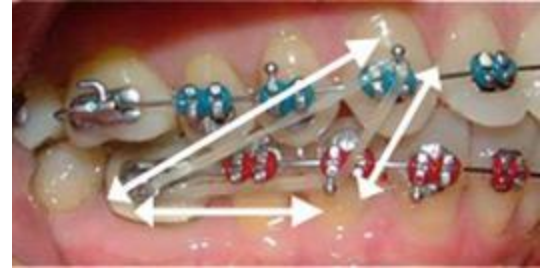
An elastic is essentially a small rubber band that your orthodontist will tell you to attach to your braces in a certain configuration/shape. The purpose of an elastic is to allow the patient to assist the orthodontist in the movement of their teeth. Braces often times may not be able to move teeth exactly where the orthodontist would like, thus elastics help with that movement.

**\*Special Note: You as an assistant be responsible for showing the patient how to put on and take off the elastics.**

**Class II elastic** – These elastic usually attach from the upper canine hook to either the bottom 1st molar hook or 2nd molar hook. These elastics help move your upper teeth back and your bottom teeth forward.



**Triangle Class II elastic** – Like the Class II elastic, this elastic starts from the upper canine hook. It also attaches to a bottom bicuspid hook along with the bottom 1st molar or 2nd molar hook forming a triangle. This helps move your upper teeth back and bottom teeth forward and also helps bring the back teeth together and touching.



**Class III elastic** – This elastic starts from the bottom canine and goes to the upper 1st molar or 2nd molar. This moves your upper teeth forwards and bottom teeth back. This is the opposite movement from a Class II elastic.



**Triangle elastics** – these elastics attach to three teeth and form the shape of a V. These elastics help bring teeth together and touching. They can be used on front teeth or back teeth.



**Crossbite elastic** – These elastics usually run from the inside of an upper tooth to the outside of a bottom tooth to help correct a crossbite (a situation where your upper teeth are inside your bottom teeth).



**Midline elastic** – This elastic can run from the upper canine hook to the bottom canine hook, but it can also be attached to other front teeth. This helps line up the center of the upper and bottom front teeth.



## **INVISALIGN:**

Invisalign takes a modern approach to straightening teeth, using a custom-made series of aligners created for you and only you. These aligner trays are made of smooth, comfortable and virtually invisible plastic that you wear over your teeth. Wearing the aligners will gradually and gently shift your teeth into place, based on the exact movements your orthodontist plans out for you. You just pop in a new set of aligners approximately every week, until your treatment is complete. Even though most patients would love Invisalign it is not for everyone. It depends on the case and if the patient is willing to wear their trays 24/7.



\*This is what the trays will look like! It's a clear plastic that look like essix retainers but it is a thicker material. In the picture to the left the lower tray is not fitting well.



## **J. Instruments**

### **Basic Setup/Bonding:**



**Mirror** –

**Bracket holder** – Place brackets on teeth.

**Explorer** – Used to take off o rings.

**Distal End Cutter** – Trims the wire distal to the buccal tubes or distal to the brackets.

**Ligature Cutter** – Cuts the steel ties and power chain. Meant to cut soft materials. Do not cut the wire with the ligature cutter as this will dull the instrument.

**Weingart Plier** - Insert and remove wires in and out of the buccal tubes. (Rarely have this)

**Mathieu (Hemo)** – The Hemostat is used to put elastic O-rings, power chains, tie steel ties and put on rubber bands.

## **Banding:**



**Tweezer-** To get new bands without contaminating everything.

**Scaler/Band pusher –** Removes extra glue and used to push bands down properly.

**Posterior Band Remover –** Used to remove posterior bands. Mostly used on the first and second molars.

**Bite Stick -** Used for patients to bite down on while the assistant is seating the bands on the molars.

**Bird Beak** – Adjust Hawley retainers

or make bends in the wire



**Three Prong** – For grasping wires and

clasps for intraoral arch wire


adjustments as well as for Hawley retainers.



## **K.ADHESIVES:**

We use different kind of adhesives for all of our appointments. It is very important that you know all the adhesives and when to use them. If you mix up the adhesives then you won't get a good bond or a good banding.

## **BONDING MATERIALS:**



The image shows three dental bonding materials arranged horizontally on a light gray surface. On the left is a syringe with a green cap and a blue label, containing a clear liquid. In the center is a small, dark brown bottle with a white label that reads 'Resilience' and 'Sealant Resin'. On the right is a syringe with a black cap and a blue label, containing a clear liquid. Arrows point from the text boxes to each of these items.

**Composite aka glue:**  
Add small amount to bracket then place on tooth.

**ETCH:** Etch the facial side of each tooth for 20 seconds. Rinse off fully and suction excess.  
  
Air dry until you see “frosty white” appearance. If you do not see this tooth was contaminated with saliva therefore start over.

**Sealant aka primer:** Add THIN layer to facial surface of teeth and then light cure each tooth.

You will not use these materials for crowns. There are special products for crowns.

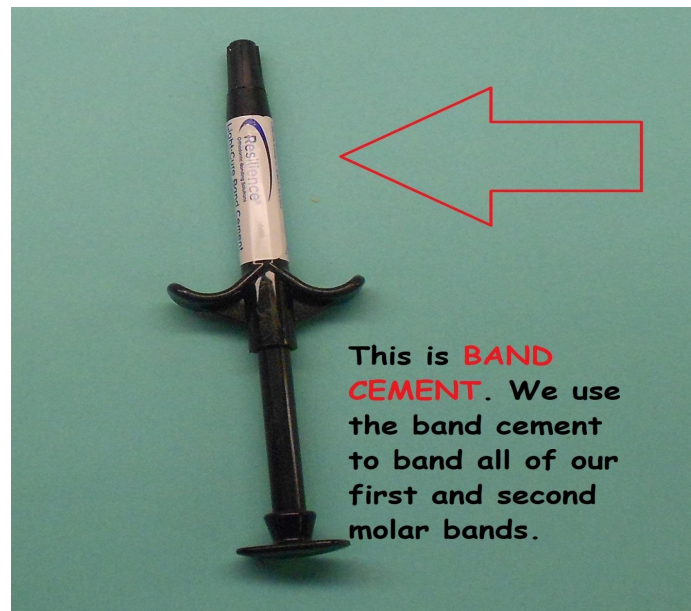


## CROWN BONDING MATERIALS:



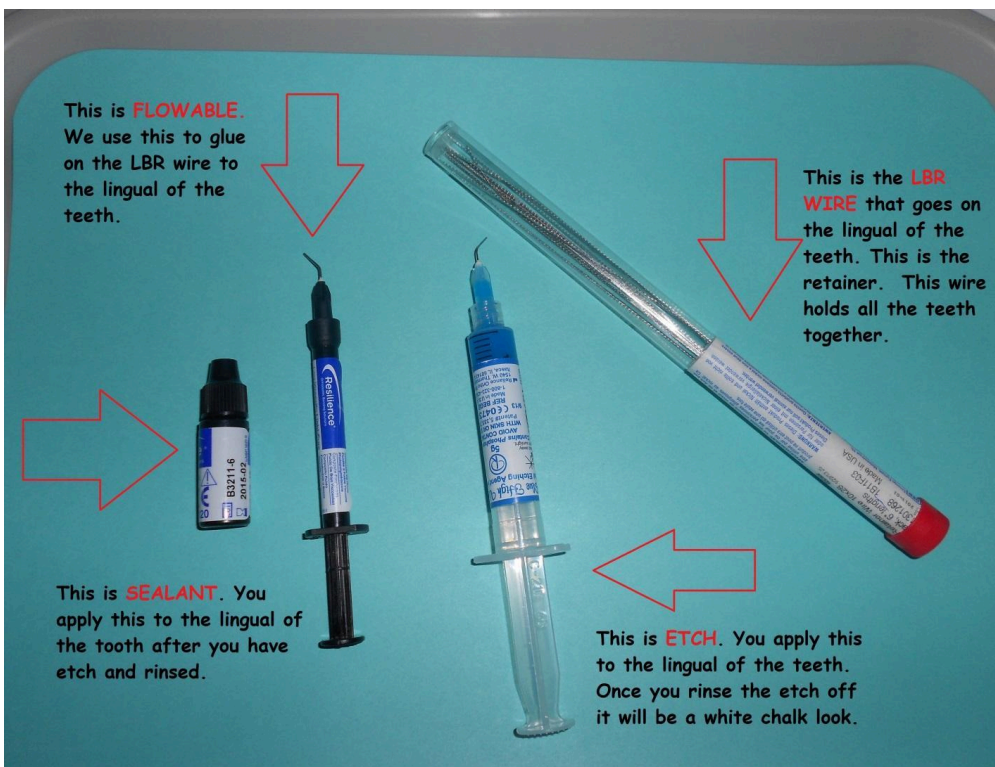
You will only use the PORCELAIN ETCH & CONDITIONER on crowns.

## BANDING MATERIAL:



\*Special Note: You will only use this to band your first and second molars.

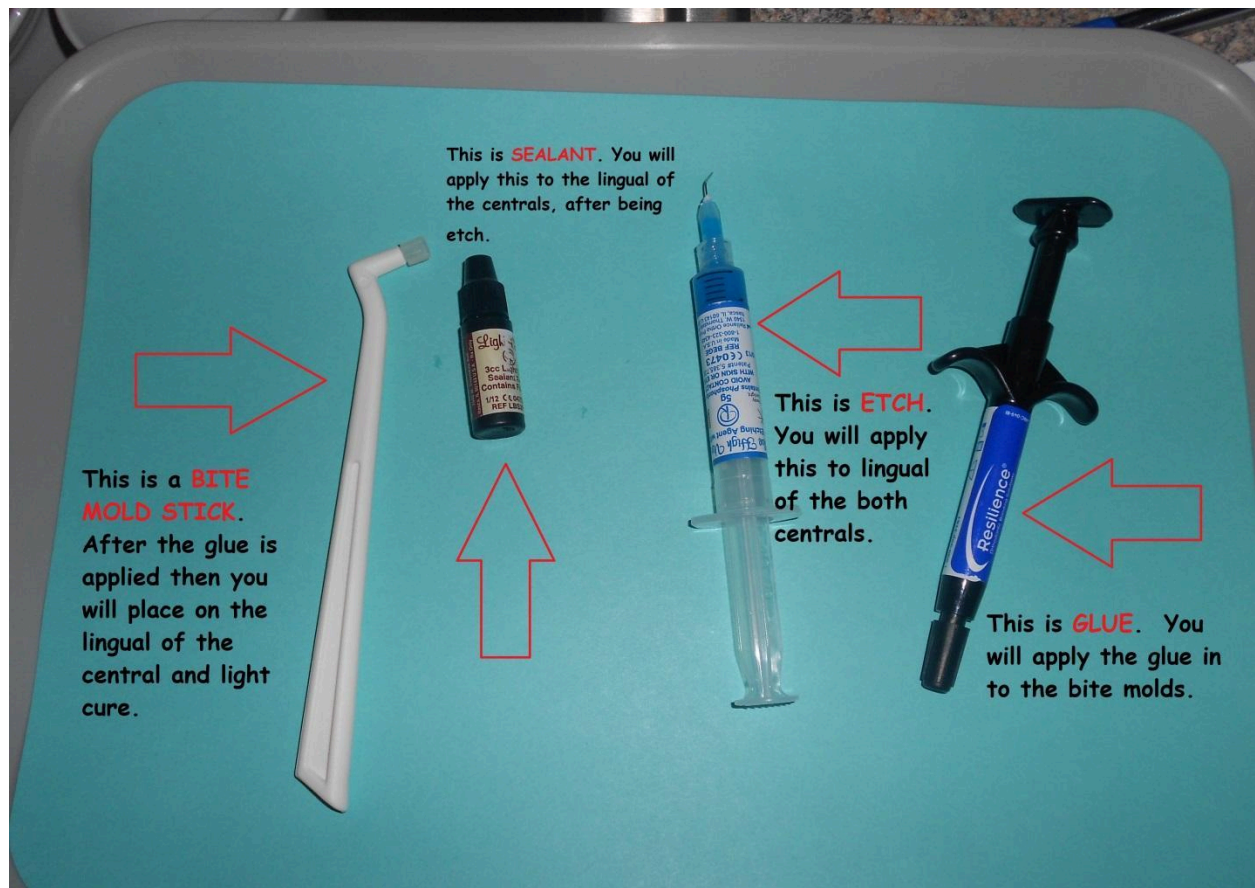
## LINGUAL BONDED RETAINER MATERIALS:



Assistants typically put on the bonded lingual retainer.

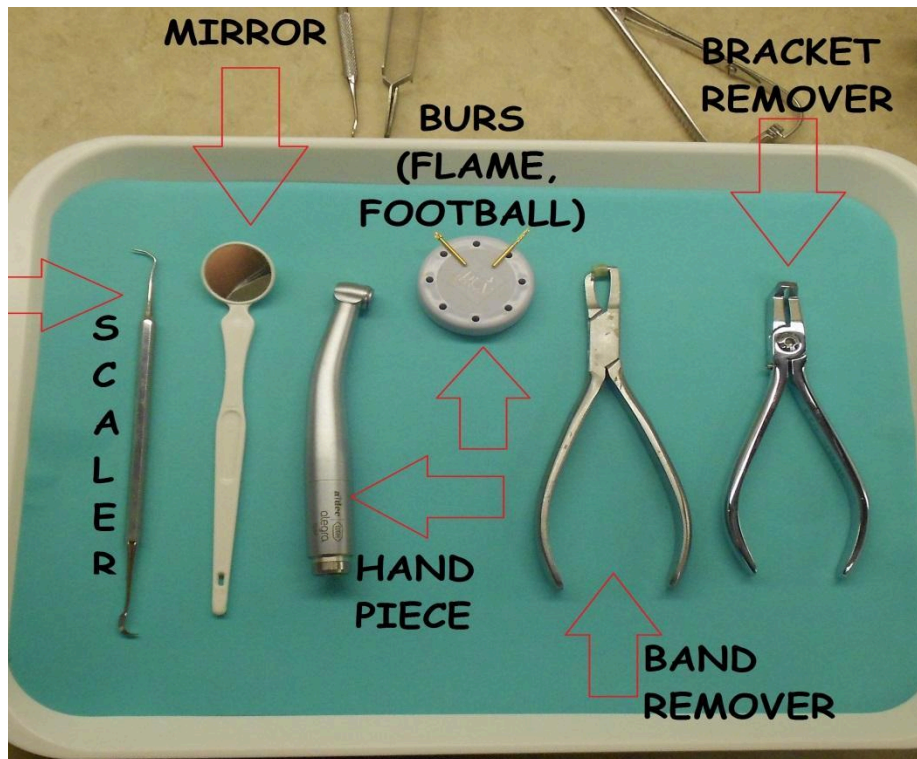


## BITE TURBO MATERIALS:



The bite turbos prevent you from biting down on and hitting the brackets on the lower.

## Debonding Set Up:



**\*Special Note:** This is the set you will use if you have a debonding. You will also need the impression materials. Because the doctor will have you take impressions for retainers.

## L. Creating Lab Cases (For Invisalign Cases or Appliances)

1. From the patient's chart, click on the Lab Case icon on the toolbar.
2. You will change the provider to the correct provider.
3. Select the Lab you're sending to.
4. Select **Appliance** under Set Due Date
5. Input your notes.
6. Under Tracking, Click Now on the Sent row. ( This should be the date that the case is actually being sent out or picked up to be sent out. If lab is not picking up until next day change the date to the correct day. )
7. Fill out the Lab Script with patient's info. Give the script to the doctor to write their notes and sign off on the script.
8. Scan into the patient's chart.

**Edit Lab Case**

Patient: Test Test

Appointment:  Detach

Planned Appt:  Detach

Provider: Dr. Vera

Fee: 0.00

Invoice Number:

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: Mon 12/20/2021

Instructions: Crown for #4, Shade A2  
Tracking #1234567 NC

Tracking:

Created	12/07/2021 11:55:42 AM	Now
Sent	12/07/2021 11:56:20 AM	Now
Received		Now
Quality Checked		Now

Buttons: Delete, New Slip, OK, Cancel

### Labs:

- Studio360
- Westbrook Dental Lab
- AOA
- Invisalign
- Reliable
- Helm

**Edit Lab Case**

Patient: MARISSA TEST

Appointment:  Detach

Planned Appt:  Detach

Provider: Dr. Vera

Fee: 0.00

Invoice Number:

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

Buttons: Delete, New Slip, OK, Cancel

## **M. Scripts / Verbal's**

Scripts for RDA's: Comp Exams

Remember to make the patients feel special. People will not necessarily remember everything you tell them but they will remember **HOW YOU MADE THEM FEEL.**

"Introduce yourself" **While walking to pano room**

Take pano then walks to opertory and start your scripts

***"Welcome in, how did you hear about us?"***

***"We are very happy to have you here! Are there any main concerns before I get started with your x-rays? And would you be interested in a complimentary Ortho consultation?"***

***"I am going to start by taking a full mouth set of x-rays which includes a bunch of little ones of each individual tooth. We have a TV here and one on the ceiling which we offer Netflix and headphones. We also have blankets if you're cold and neck pillows if the seat is uncomfortable for you. Once the doctor has come in and gone over any treatment planned for you, feel free to ask any questions you may have as our doctor is happy to answer any questions. We will also play some educational videos as well. Our treatment plan coordinator will then come in before moving on to any treatment or cleanings and let you know about any copays you may have and from there you can decide to stay for treatment."***

### **Keywords to mention:**

- Netflix
- Headphones
- Blankets
- Pillows
- Educational videos
- Complementary whitening trays
- Free whitening syringe for every recall visit
- Waters
- Coffee
- Complimentary ortho consult
- Hot towel
- sunglasses

## **Verbal's:**

### Patients that complain about Doctors

Inform patients that the doctors are highly trained and all practice the same.

They may **Request** a certain Doctor or to remain with that doctor at all times for their procedures let them know we will do our BEST to accommodate them with that request.

### **Patient has pain after dental treatment**

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

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

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

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

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

### **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.”***

## **N. 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.