

Asking For Reviews & Referrals

Purpose:

An excellent and easy way to grow our practice is by offering incredible service that our patients will naturally want to refer friends and family to. Our entire team is committed and expected to ask for reviews and referrals from patients daily to continue to share great information about our office with others who may be looking for a dental practice.

Steps:

1. Give them our review card
2. On our review card there are three places they can leave a review and get 10% off for leaving a review on their next treatment in our office. The 10% off can also be applied to same day treatment as well if the patient has work that needs to be done.
3. There are 3 URL codes on the review card which can be scanned by their phones and it will route them to the proper place on the Internet where they can leave review.
 - a. Google review-will be the best for us (they must have a Gmail account to leave a review on Google)
 - b. YELP-2nd best (patient should only review on yelp if they are an existing yelp account and have left other reviews)
 - c. Facebook-3rd best (if they add a photo of their beautiful smile with their review you can add an additional 5% off)
4. Everyone these days has a cell phone and can leave a review right away, others may not and thats ok too.
5. To apply the 10% or 15% (Facebook photo+review) please log into which ever place the patient left a review and check to make sure they left one, sometimes patients will use other accounts to leave the review that's ok too just have them tell you what the name is or have them show it to you on their smartphone
6. To apply the 10% or 15% off for their future treatment or the day off treatment use the following transaction codes:
 - a. GOOGLE (50.07)
 - b. YELP (50.55)
 - c. Facebook (50.09)
7. For same day treatment you calculate the \$ amount discounted and apply it to the correct provider# who performed the treatment, in the note section write what procedure code the discount is for and your initials.
8. If its a future appt and you know the total \$ amount ---ONLY put the \$amount in the note sections along with the procedure code of future appt and your initials and put it in under doctor #16. When the patient comes in for that treatment you MUST edit the discount transaction by changing it to the provider who did the work, the date the treatment was done and you will edit the note section to say the procedure codes and your initials. .
9. If the patient doesn't have any treatment needed you may still apply the code to the patients account but leave the amount empty and in the notes section write to be used for any future treatment needed/not yet applied and your initials, and it put it under doctor#16.
10. If a patient needs treatment later you MUST edit the discount transaction by changing it to the provider who did the work, the date the treatment was done and you will edit the note section to say the procedure codes and your initials. .

Verbiage:

- Review:
 - "How was your visit today?"
- When they respond that they've had a good appointment:
 - "That's so great to hear! We love great patients like you. Would you mind leaving that great feedback online with these simple steps (HAND THEM A REVIEW STEP-BY-STEP) so other patients like you can find us?"
- Referral:
 - "Thank you for always being such an incredible patient, Mrs. Jones! You are always on time and so happy! We'd love to have more patients just like you. Do you have anyone close to you looking for a dental office that you could send our way?" WAIT FOR THE RESPONSE!
 - *** Be direct, genuine, and truly mean the compliments you are giving.

Checking In Lab Cases

Purpose:

To ensure that our office delivers exceptional patient care, checking that all lab cases are ready for their seat appointments is essential. All appointments, requiring lab cases, should be confirmed that lab cases will be there for the scheduled appointment.

When lab cases come into the practice, they need to be noted on the appointment card for excellent office communication and patient care. A designated front and back office team member should be responsible for lab case accountability.

Steps:

Insert Steps Here

1. Lab cases are delivered and picked up from and to the office on a daily basis from different Labs.
2. The delivery personal are to be directed to the server room where they will find a dental lab work bin labeled IN/OUT.
3. Go to List/Labs/pick the lab whose bag you are holding(each bag has the name of the lab where its from) and search for the lab on the list. Once you found the lab on the left side of the screen you will click on Lab Cases.
4. The Lab Case Report will you give you the names of all the patients whose lab work is opened, when its expected to return to our office and the date of return when we got that lab work back from the lab.
5. Once you have the lab case bag in front of you and now you know which lab it is, open the bag and in the bag you will find an invoice from the lab, with the patients name, tooth # or what the lab work is and the \$ amount how much the lab work cost as well as invoice #.
6. As you will see the Report has three colors, Green, Red and Blue. Green -means we are waiting on this lab to come in from the lab, Blue-means the lab is back but the lab case hasn't been set to complete. All the red colors means the lab case is here and its marked complete.
7. Click on the patients name you are looking for/edit , tab down to expected date: fill the date in with the current day, then tab to invoice # ___ fill in the invoice that you find on the receipt from the lab and the Fee:_____ which will be on the receipt.
8. Always check that the lab work in the lab is actually the lab work in Softdent, sometimes the patient might have multiple lab cases out at once.

Cleaning the Fridge

Purpose:

Our office maintains a level of cleanliness and expects all team members to contribute and help maintain such standards. Cleaning the fridge is a way to ensure the office is clean and must be completed weekly.

Steps:

1. The cleaning schedule for the entire office for each employee is to be found hanging in the Sterilization Area.
2. If your name is on under kitchen on Friday that is when you will clean out the refrigerator. Anything perishable that is left over the weekend, must be cleaned out and thrown out. Then the garbage needs to be taken out to the side of the building where we have trash cans and the trash can that is green the garbage bag should be thrown in there.

Communication System

Purpose:

To avoid confusion and poor patient care, our office utilizes a communication system that allows all team members to know when a patient:

- Has arrived
- Is seated
- Is ready for treatment
- Is ready for treatment plans presentation
- A patient is running behind or canceled

Being fully aware of this communication system and utilizing it can create continuity and fluidity amongst our office.

Steps:

1. When the patient arrives you must greet all patients according to greeting scripts protocols.
2. In the softdent module you will ONLY check the patient in when they have arrived. You do this by right clicking your mouse on the appt, scroll-down to check in and left click on the mouse. It will then tell you the patient is late by # of minutes would you like to track this, the answer is always yes. The appt will then turn light blue.
3. We have an intercom system that we use in the office, when you check in the patient, you will see in softdent who the provider for that patient is on the top of the schedule module. Once you know who the patient is here to see (which provider) you will go over to the intercom and press the appropriate provider and patient button.
4. All the pink colored appointments are confirmed.
5. All the yellow appointments are not confirmed.
6. The appt icon will turn gray if the patient is late for their appt time and has not come in yet, or haven't been checked in yet. Always call this patient 5 minutes after they are late for their appt (follow the script for late appts).
7. Once the patient is called to the back office you must change the status of the patient to change location by right clicking on the patient appt and scroll down to change location, once you have done that the appt will turn green.
8. All green colored appts means the patient is in the back office getting treatment
9. The dark blue colored appts means the patient has been checked out.
10. The communication intercom is divided by 6 buttons on top and 6 buttons, the intercom is labeled below of which button belongs to which provider. The "come" button is used by the back office staff mostly. The "patient" button is used by you when you check in a patient ----you press the provider button to who the patient is here to see and the patient button.
11. To stop the intercom system at any time you can press the gray button.
12. If multiple providers patient are in, you can put one combination in at a time, wait for it to be turned off, then press the next combination, and so forth.
13. If you see the provider that you are connecting to is not turning off the intercom from their end you may press the black button once and it will sound a loud beep through out the office. If after that, they still don't answer you will turn off the intercom using the gray button and walk to the back office to let the provider or the providers assistant know their patient has arrived.
14. If a patient had called or texted to let us know they are running late for their appt, a note needs to be added next to the patients appts -alerting the entire office.
15. The combination of a come button and one of the hygienists buttons turned on- this means a hygienist has a treatment plan that needs to be prepared for the patient sitting in their chair. Press the gray button to turn off the prompt and immediately start to prepare a treatment plan for the patient. The patient may or may not do the treatment same day but this is top priority and must be ready for presentation whether in an operatory or at the front desk.

Formatting Patient Schedule - Weekly

Purpose:

To aid appointment flow and allow for certain services to be provided at the optimal times of day, the schedule needs to be blocked out to ensure this occurs. This is updated in our dental software monthly in a way that the entire team is aware of scheduling specifications for services such as SRP, RCT, Implants and New Patients. By blocking the time in the schedule, and reviewing weekly, this allows us to serve patients in need without long wait times for appointments.

Steps:

1. The schedule is divided into columns on the top, the General practice doctor has a main column and a side column to the right of main column. The main column is for production procedures, the next column is for side-books as we call them or non production appointments.
2. On the left and right side of the schedule you will see Time, our appts are by 10 minute units. So every hour has 6 units.
3. Every month we have Specialists rotate, such as a Oral Surgeon, Endodontist and Periodontist. The schedule is blocked out for the Endodontist and Periodontist specialists in the third column at the 8am-9am slot, it will say: Dr's name ___ time they are working from _____. (ex: Dr. Wong 9-5pm.) The note slot will usually be a bright pink or purple color. The side book for the specialist will be in a column that will have the same color slot also found in the 8am-9am time slot. The only specialist that has their own column is the oral surgeon, the last column(8) in the schedule(gray color-will say Dr. Hirshorn), his side books will be noted in column 6 and it will say in note slot in column 6 (ex: Dr.H sidebooks 9-5).
4. Oral surgeon-main column can only have production procedures, no consultations and no follow ups. The units of time needed for production appt come from the doctor who diagnosed the procedure. Follow-up's are 20 minutes (2 units), Consultations are 20 minutes(2 units). A 1 hour lunch break will depend on the assistant the doctor is working with. Consultations and follow-ups are to be scheduled in the first 20 minutes of a production appt that is in the main-book.
5. Periodontist- in the main slot will have 3 or 4, 1.5 hours blocked out for production procedures, with 3 or 4, 30 minute consultations in the main book, and a 1 hour lunch break depending on the assistant the doctor is working with. The side-book column is to have follow-up appointment only. The follow up appt can only be in the first 20 minutes of the production procedure. No side-books of follow ups any other time, unless approved by the Manager or doctor.
6. Endodontist main column is 1.5 hour slots for each molar tooth and 1 hour slots for all other teeth, unless requested otherwise by the doctor. Consultation and follow-ups are in the sidebook in the first 20 minutes(2 units) of the appt. Endodontist only has lunch if works a full day, otherwise there is no lunch hour.
7. The hygienist are in columns 5,6,7 their names of who the hygienist working is on top of the column and the hours they are working are in a 1 hour block note(ex: Erika 8-6). All hygiene appts are 1 hour long, including deep cleaning (SC/RP).
8. New patients with no pain are scheduled with the hygienist for 1 hour and then sidebooked with the doctor for 30 min sidebook either before the hygiene or after the hygiene appt, the doctors scheduled should be evaluated to see what fits better in the doctor schedule sidebook.
9. If a new patient emergency patient calls with pain- they must be given the same day appt.- in the doctors main column for for 40 minutes(4 units).
10. If an existing patient call with an emergency also main book 40 min (4 units).
11. Follow up appts for General Practice doctors may include but not limited to(impression of night guard or delivery of night guard(NG), temporary or permanent cementation of a single unit crown, delivery of prosthetic cases, post surgical evaluation, invisalign tray pick up, itero scan, extra x-ray needed, new impression needed)Anything else not on this list that arises ask the Manager or doctor for further instruction.
12. Production appts for the General Practice doctors includes but not limited to: (fillings, crowns, root canals, prosthetics, extractions)

Ideal Doctor Treatment Times

Purpose:

Ensures that the Doctor's schedule is full, meets production requirements and is done so in a way that is doable for the Doctor and back office team. By utilizing ideal treatment times, the schedule will properly flow allowing for best patient treatment optimization.

Steps:

The chart below is an estimated appointment times needed to schedule in the doctors schedule.

1. If you are scheduling an appt by phone use the following chart to schedule the times needed for each appt.
2. In the following chart MB- main book, SB- sidebook
3. If a patient is in the office and you are scheduling a patient for their next visit, the Routing slip that will be given to you will have the T (time units) that the doctor will need, schedule according to what the doctor wants.

Doctor's Ideal Treatment Times

- Crowns (MB)
 - 1 crown- 1 hour
 - Crown+Post and core- 1 hour.20min
 - 2 crowns +
 - ◇ Same quadrant- 1 hour 40min
 - ◇ Opposite quadrants- 2 hours
- Crown seat
 - Single crown- 30 min (SB)
- Two or more crowns(MB)
 - ◇ Anterior: 40 min
 - ◇ Posterior: 40 min
- Invisalign
 - Records appointments- 40 min(MB)
 - Seat appointment- 40 min (MB)
 - Follow-up appointment- 20 min (MB)
- Extractions(MB)
 - Wisdom teeth for Specialist (MB)
 - ◇ 1 tooth- 40min
 - ◇ 2 teeth- 1 hour
 - ◇ All 4- 1.5 hours
 - GP Simple 1 tooth - 40 min
 - GP Surgical 1 tooth- 60 min
 - GP simple 2+teeth 1 hour
 - GP surgical 2+teeth 1.20min
- Denture/ Partial
 - Initial Impression-30min (SB)
 - Bite Block Wax Try-In- 60 min (MB)
 - Try in with teeth- 30 min (SB)
 - Insert-Seat- 30 min (SB)
 - Final Impressions- 60 min (MB)
 - Adjustment-30min (SB)
- Fillings (MB)
 - 3 in same quadrant (1-2 surfaces)- 1 hour
 - 3 in same quadrant (3-4 surfaces)- 1 hour 30 min
 - 3-4 fillings in separate quadrants (1-2 surfaces) 1 hour 30min
 - 3-4 fillings in separate quadrants (3-4 surfaces) 1hour .40 min
 - Anterior fillings 2-4 (1-2 surfaces)- 40 min
 - Anterior fillings 2-4 (3-4 surfaces)- 1 hour
- Nightguard impression 30 min (SB) - Night Guard delivery-20 min (SB)
- Limited exams and PA(Emergencies)- 40 min(MB)
- CompEX(SB)-30 min/CompEx+FMX- 1 hour (MB)
- Implants(MB)
 - 1 implant placement- 1 hour 20 min (primarily all Dr time)
 - 2 implant placement- 1 hour 30min (primarily all Dr time)
 - ◇ 3-4 implants in different quads- FOLLOW-UP WITH THIS AS DR. STARTS TO PLACE THIS MANY
 - Extractions and immediate placement(MB)
 - ◇ 1 tooth in the anterior/ pre-molar- 1 hour 30min
- Root Canals GP's(MB): Anterior- 1 hour
Premolar-1hour.20min
Molars-1hour.30min
- Root Canals Specialist(MB): Retreat Anterior - 1 hour
Retreat Premolars-1 hour 30 min
Retreat Molars-1 hour 30 hours
- Osseous Surgery 1 quad-40 min(MB)
Osseous Surgery 2 quads-1hour.20min(MB)
Surg. Extraction+Bone Graft+Membrane -1.30min (MB)
Surg Extraction- 1 hour(MB)
Sinus Lift-1.30 min(MB)
Specialist Consultation Perio:30min(SB)
Endo: 30min(SB)
Surg: 20min(SB)
Follow-up all doctors: 20 min (SB)
- CoreBuildup- 40 min(MB)
Close space on existing crown after root canal-30min(MB)
- Implant Crown Impression-40min(MB)
Implant Crown seat-40min(MB)

Assistant Morning Huddle Prep

Patient Name	Med Alert	Today's TX	Plus TX Opportunities	TX Plan Updated Y/N	Last Visit	Recare Scheduled?	Lab Cases In	X-rays Needed	Notes

Patient Check-In

Purpose:

Properly addressing arriving patients in a friendly manner, notifying back office of arrival and providing patients with any information or paperwork necessary for their appointment allows our office to stand out for patient experience. We hold all team members to a high level of customer service and patient check-in is where it starts.

Steps:

Properly addressing arriving patients in a friendly manner is very important you must follow the Service Vision Protocol.

1. If you know the patient, GREAT! always greet them by saying " Hi Mrs. Jones, I will let the Dr_____ or Hygienist name know you are here.
2. If you don't know the patient, we have facial photo id on some of the patients appt, click on the icon with the face and look at that first and then follow step1.
3. If we do not have facial id on file you say: " Hello, may I please have your last name so I can help you check in?"
4. If it is an existing patient use the Communications protocol to let the provider know their patient has arrived by changing the status in softdent from confirmed(pink) to Ready(blue).
5. If its a new patient: you say" Mr. Jones we have been waiting for you, welcome to the office". " Have you had a chance to fill out the forms online?"
Answer: Yes: you say " Great I will just give you our Ipad so that you can finish signing the forms" " May I always have a photo id and an insurance card to make a copy of?"
Answer: No: say " No problem, we will just give you an ipad and you can fill out the forms here"
6. Once you get the Ipad you will explain to the patient how to use the Ipad " These are 7 forms that you will need to fill out, you can use this stylus to as your pen, you can click on each form, scroll down to fill out all the sections, when you get to the end of the form there will be a green submit button that you will click, then you can go onto the next form." If you have any questions let me know,.
7. If someone has a language barrier or are older and have difficulties using the Ipad, at this point you say" I can assist you in filling out the forms" if you cannot help with language translation, say: "I will find someone to help you translate the questions and fill out the forms".
8. Scan the insurance card into the document center
9. Scan the photo id into the portrait module.
10. When the patient comes back with Ipad you can give them back their id and ins card.
11. At this point you should know how long it will be until the patient is called by the back office:
 - a. on time: you say "Mr. Jones, the hygienist name..... or Dr's _____name assistant will call you shortly.
 - b. late: say Mrs. Jones, Dr..... or hygienist name...are running _____minutes behind. (if the doctor or hygienist is running more then 15 minutes late, you are to find a free assistant and ask them what room the patient can be seated, seat the patient in that room 10 minutes after they have finished their forms, if not a new patient seat the patient 15 minutes past their appt time in the room allotted to you by the assistant. If the hygienist is running behind find an assistant again, let them know the hygienist is running late and if they can allot a room where one of the assistants will take the xrays needed for the patient, if the hygienist is running even later the doctor can go in and do the exam before the hygienist takes them into a hygiene room for the cleaning.
12. At this point if its a new patient and all forms have been filled out, you will go onto softdent and YOU MUST accept all the forms except the medical history form-that will need the doctors signature. You go to right click on the appt, scroll down to e-forms/review forms/ a form will pop out where you will see all the forms, if a form says signature required and its not a medical form, that means the patient forgot to sign a form, then you will have to log the patient back on the Ipad , find the form thats not signed, find the area thats not signed and let them sign it, and once again review the forms online. Once all the forms are filled out, you can then use the Communication protocol and let the provider know their patient is ready to be seated.
13. Once the patient is seated by the back office -change the status of the appt to green by changing the location.

SERVICE VISION

What is our promise to our patients?

- We are going to make your day!
- The answer is “Yes”, now what was the question? OK, lets see what we can do...
- You may complain about an mistake but you’ll rave about how we handled it

What do we do at Linden Dental:

- What is our business: Making people smile inside and out
- What we sell: Long term dental health, comfort and peace of mind
- We make price irrelevant by: Catering to patient’s individual values
- We create careers: By being an excellent student and teacher to our co-workers

ALWAYS

- Wear smile, name tag.
- 10’ smile, 5’ say “hello”
- Greet by name, repeat it 3 times
- 4 point hand off (Name, Concerns, Next, Compliment)
- Make it happen today
- Solve tomorrow’s problem today
- Do what it takes to make it right
- Own it- even if it is not your fault
- Solve patient’s issues on the spot
- Anticipate a patient’s needs
- Acquire, document and share patient’s needs and values
- Appropriate business casual attire
- Be open to learning and training if applicable

NEVER

- Ignore a patient
- Leave a patient alone
- Say “no” or “I don’t know”
- Over share with a patient
- Criticize others
- Accept “ok” for a patient experience
- Unrelated conversation in front of a patient
- Make the patient wrong
- Leave someone on hold for over 1m
- Tell an emergency they can’t be seen today
- Waste time or resources
- Speak negatively of anyone or anything
- Make excuses
- Use your cell phone in a patient area , front desk or operator

Prescriptions - Calling In & Documenting

Purpose:

When the doctor requests a patient's prescription to be called in, you are to appropriately dictate all prescription information to the pharmacist (pharmacy of patient choice) and document appropriately in the patient chart for full record keeping.

Steps:

- When a patient at office requires a prescription we may call the prescription into the pharmacy and leave a message for the patient, EXCEPT the ones that are not allowed by phones(pain medications other then Tylenol cannot be called in). Antibiotics and mouth rinses can be called in.
- Have all the below information ready before calling the pharmacy
- To call in the prescription you will require:
 - Pharmacy name
 - Pharmacy phone number
 - Patient name
 - Patient date of birth
 - Medication name
 - Dosage (typically in mg)
 - Frequency(TID, QID, PRN)
 - Quantity of pills to dispense
 - Refill if any
 - Substitution permissible or not

The pharmacy will also require office information:

- Doctors name who is prescribing the medication
- Office address
- Office phone number
- DEA# of the doctor(may be required)
- NPI# of the doctor(may be required)

If you leave a message on the pharmacy voice-mail and they have more information that they need they will call you to ask.

The next step you will do is to document the prescription in softdent. [VIDEO PART3\(1\)](#)

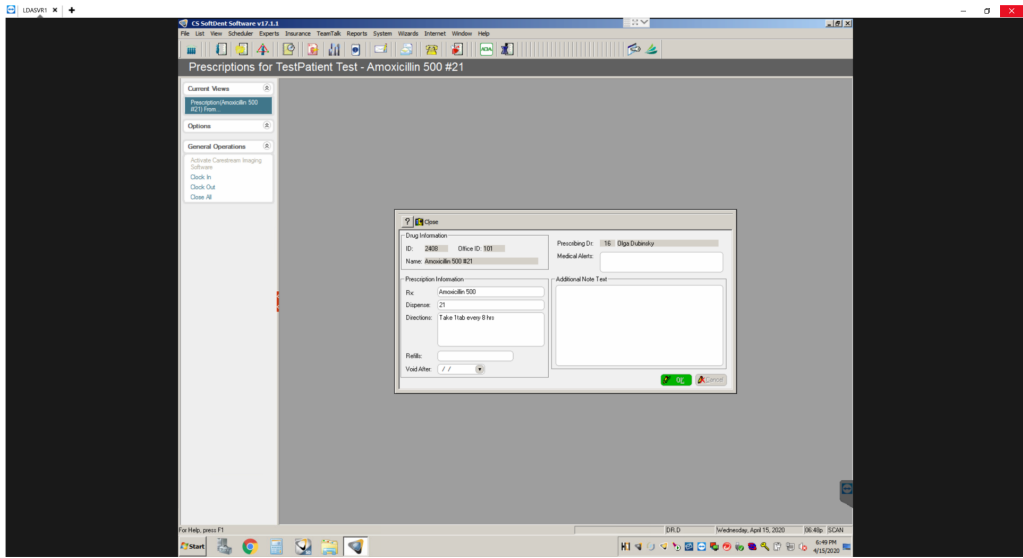
1.Right click on the patient appt,scroll to patient information/on left side left click on clinical management/prescription history/prescribe drug/paper prescription/doctor id-has to match the doctor who is prescribing the drug click on the drop down menu and choose the doctor then /drug id-click on the drop down menu and you can search the drug by name in the find: field type in the medication and match it to what the doctor wrote on the routing slip or on an Rx script.

2.Window will open where you will check all the required fields

- a. Rx field: name of drug doctor prescribed
- b. Dispense: the quantity the doctor prescribed must be correct
- c. Directions: how the doctor wrote he wants the patient to take it TID(3x/day or every 8 hours) BID (2x/day or every 12 hours) QID (4x/day or every 6 hours) Q4-6H PRN (take every 4-6 hours as needed for pain)
- d. refills: write in how many or zero if none
- e. Additional note text: type in called in by phone or patient took paper Rx pharmacy and your initials of your first and last name.

3.Press Green OK button

4. A window will open, by default its will be on paper prescription but you will click on choose a pharmacy if you called in the script (and search for the pharmacy that you called, if its not there add it to the list by pressing add on top of the screen)or paper script if you gave the patient the Rx script.



E-forms via Ipad

Purpose:

E-forms are an easier and more efficient way for patients to fill out new patient forms Online from the comfort of their home. They do not need to print the forms at home, when they come into the office we will bring up all the forms they filled up online and have them sign the forms in our office using the ipad.

Steps:

1) New Patients:

- An email needs to be collected on your new patient form for each new patient phone call and typed into patient info under contact info so that they will receive the new patient forms via email. [Video part2\(6\)](#)
- If a patient is scheduled less than two days from their appointment, you MUST manually send the forms to the patient:
 - A) Go to schedule and right click on appointment
 - B) Go to e-forms -> ADD/remove e-forms (forms will then be displayed-highlight which forms you want sent)
 - C) Go back to schedule and right click on appointment
 - D) Go to e-forms -> SEND e-forms now
- If a patient filled out the forms at home/online when they come in we MUST give them the iPad to sign for each form that requires signatures.

**Please note that all documents must be signed by the patient the day they come in or all documents will be irrelevant and the patient will have to redo it all over again!

- You MUST accept forms they just signed in soft dent besides the medical form which must be signed FIRST by the doctor then we can accept the form during checkout.
- ACCEPT the form by right clicking on appointment-> e-forms -> Review Forms and if signed click on accept/ if not signed give the patient back to sign.

2) Existing Patients:

- Any new or updated policy forms MUST be added through e-forms to a patient's appointment and signed by patient and ACCEPTED by us.
 - A) Go to schedule and right click on appointment
 - B) Go to e-forms -> ADD/remove e-forms (forms will then be displayed) (ex: highlight insurance form)
 - C) Go to e-forms -> SEND e-forms now
 - D) Sign into the iPad with staff username and password
 - E) Sign in correct patient -> click on insurance form
 - F) Give patient iPad to fill out all info and let them keep their dental card to fill it out.
 - G) ACCEPT the form in softdent by right clicking on appointment-> e-forms -> Review Forms and if signed click on accept
- Any new/updated insurance information will NOT be filled out on the iPad. Please write down insurance info on the insurance breakdown sheet and if there is an insurance card available please scan into the patient's document center and give the breakdown to the insurance coordinator.

Printing Schedules

Purpose:

Schedules are to be printed the night before, once all appointments have been confirmed, to allow team members to visualize the schedule during morning huddle and completely utilize open times. Having schedules for each team member helps with overall flow, seeing areas for additional treatment opportunities and ways to maximize our day and the patient experience.

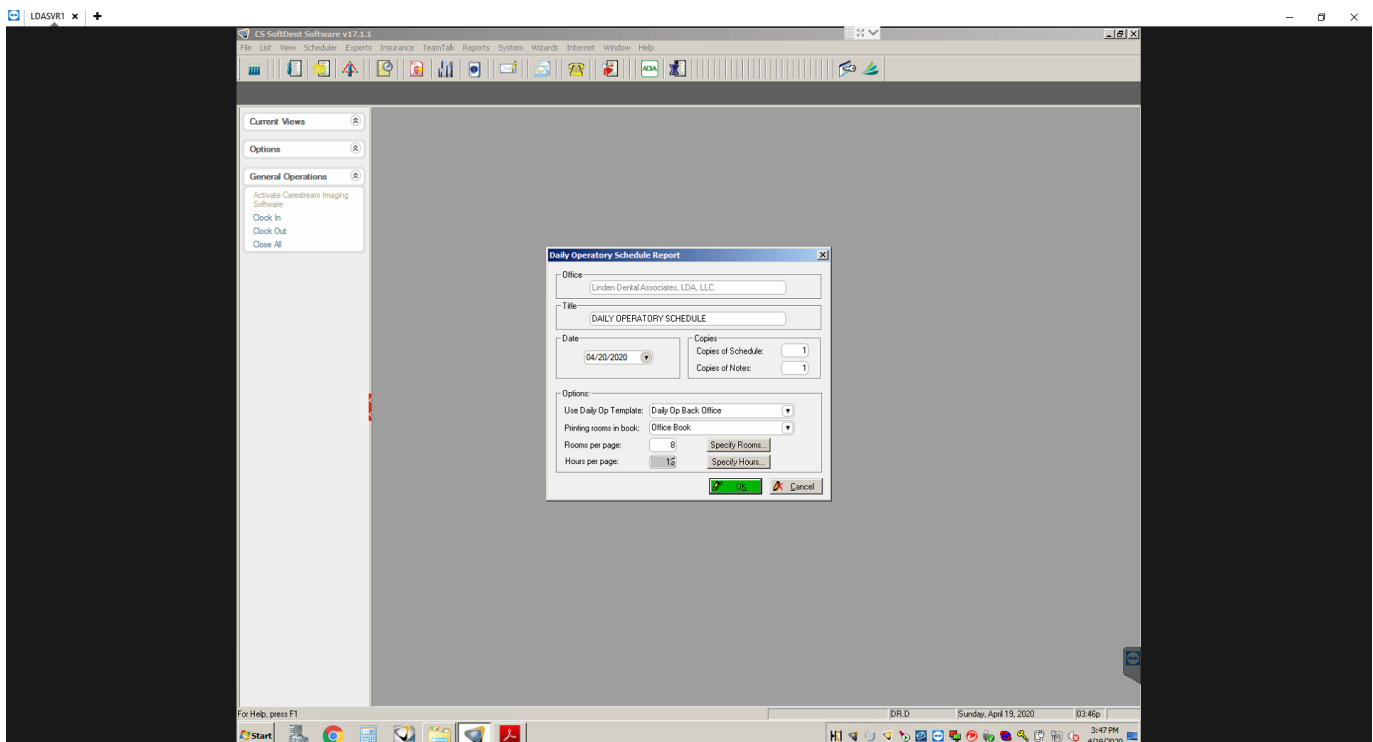
Steps:

To print the schedule go to Reports/Daily Op Schedule/Print Preview/Window will open with certain fields that need to be filled out in the this **EXACT** order: **VIDEOpart3(3)**

1. Date: change to which date of schedule you need printed
2. Copies of Schedule- how many copies you need, its best to print the amount copies right away instead of printing one schedule and then making copies of that because it will be very blurry.
3. Copies of notes-only if you need it, if not put in 0
4. Use Daily Op Template: Daily Op Back Office (choose this from the drop down menu)
5. Printing Rooms in book: Office Book
6. Specify Rooms: click on the button and choose ALL
7. Room per page:8
8. Specify Hours: 8am to 6pm/8pm(depending on the day)
9. Hours per page: 10 hours if working (8-6pm) 12 hours (if working 8-8pm)
10. Press green OK button

If the preview looks like you got the whole schedule then press print

Schedules should be placed with tape in all 7 operatories and in the lab the night before.



Screenshot:

The screenshot displays the CS SoftDent Software v17.1.1 interface for a DAILY OPERATORY SCHEDULE. The window title is 'CS SoftDent Software v17.1.1 [DAILY OPERATORY SCHEDULE]'. The menu bar includes File, List, View, Scheduler, Experts, Insurance, TeamTalk, Reports, System, Wizards, Internet, Window, and Help. The toolbar contains icons for various functions like print, save, and zoom. The main window shows a grid for the schedule for Monday, 04/20/2020. The columns represent staff members: (1) DR. NUNEZ, (2) DR. N. SIDIBE, (3) DR. DUBINSKI, (4) BARBARA, (5) MELISSA, (6) ERKA, and (7) Dr. Hishori. The rows represent time slots from 08:00 to 07:00. The schedule includes various appointment types, cancellations, and administrative notes. The interface includes a sidebar with options like 'Current Views' and 'General Operations'. The status bar at the bottom shows 'Page 1', 'DR. D', 'Sunday, April 19, 2020', and '03:51p SCAN'. The system tray at the bottom right shows the date '4/19/2020' and time '3:52 PM'.

REACTIVATION LETTER- After patient has been inactive for two years

Letter 1

Dear _____,

We hope this letter finds you well. In 2010 our team at _____ had the privilege of providing you with dental care. It has been at least two years since your last visit, and we were writing to say “Hello” and to remind you that regular dental visits are an important part of maintaining your overall health. We value you and your dental health and are currently offering a “Welcome Back to the Practice” offer where a free consult will be given to you, completely complimentary. Included in this offer will be an exam and necessary x-rays regardless if you have insurance or not.

Furthermore, in the past two years, _____ is the new providing doctor but has been trusted by Dr. _____ to offer exceptional dental care to their valued patients. Our team and office continues to operate based on the values that have created this incredible practice.

We offer convenient online scheduling at _____ and click “Request an Appointment” or give our friendly team a call at _____ to get you scheduled.

Lastly, we wanted to let you know about the services our practice offers along with our IN-OFFICE MEMBERSHIP PLAN AND ADDITIONAL SERVICES for those patients who do not have dental insurance. It is an incredible offer that we are thrilled to provide.

To take advantage of this welcome back, you must call to make an appointment within two weeks of this letter at _____.

All the best, and we look forward to hearing from you soon!

Sincerely,

_____ DDS and team

Letter 2- Sent out next month

Dear _____,

A few days ago, we sent you a “Welcome Back to the Office” letter, which included a complimentary consult, exam, and x-rays to welcome you back.

We understand how busy life can be and how difficult it can be to find time in an already overbooked schedule for a dental checkup. For this reason, we’ve decided to extend our offer for an additional week to encourage you to take advantage of our offer.

Oral health is very important, and we want to make sure we are able to accommodate you, your schedule, and your dental needs.

Our team is looking forward to your call at _____ to schedule your complimentary appointment.

All the Best,

_____ and team

Broken Appointment List

Purpose:

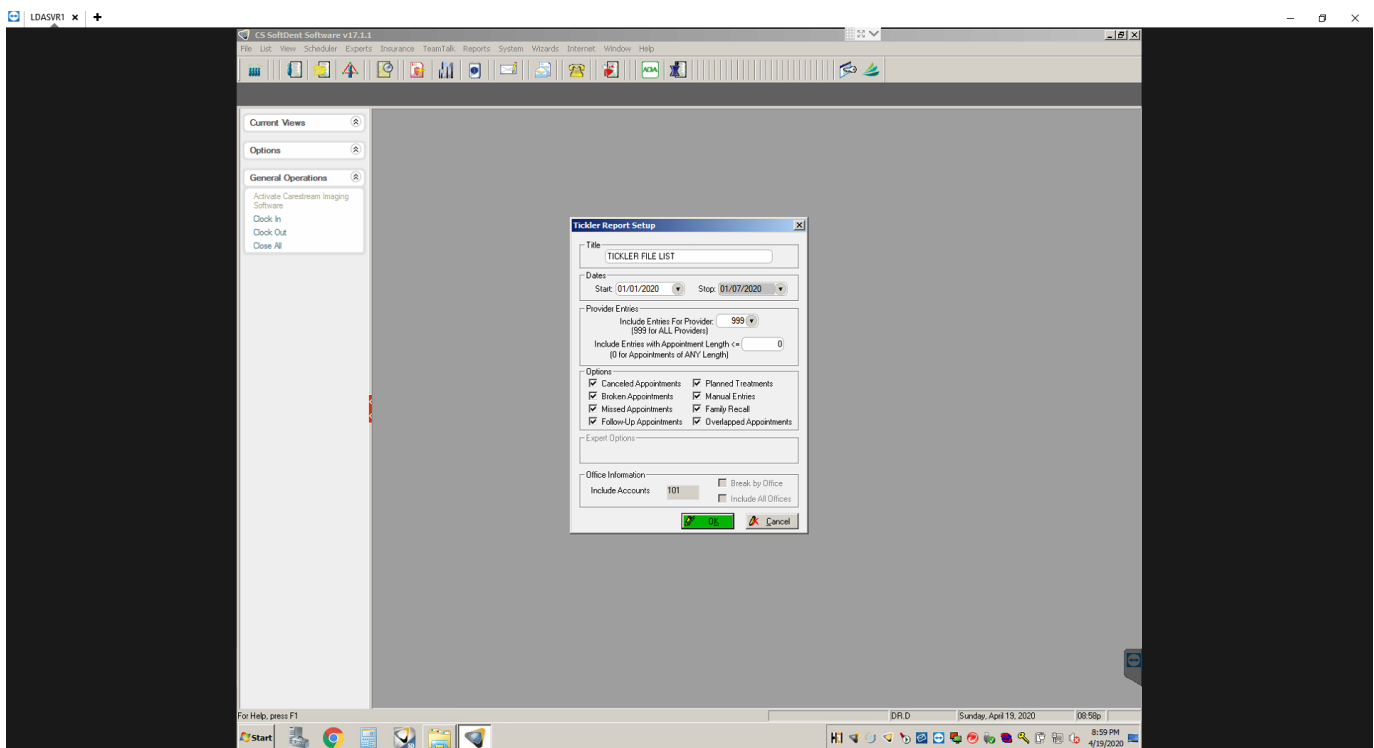
When patients do not show for appointments, we can “break” the appointment, and that will add them to a list for future calls(Tickler File). By breaking appointments correctly, and following up on the broken appointment list weekly, patients are seen for treatment in a timely manner and our office’s unscheduled treatment stays to a minimum.

Steps:

Reports/Recall-appt/Tickler File/print preview/window will open where you will enter the following fields:

Date Range: usually done on a weekly bases

Provider: if you need to quickly fill a certain providers schedule you may just search for the provider, by going to the drop down menu on Include Entries for Provider___ and choose the provider you are looking for, but if you leave it as 999 it will give you a report with all appointment that were canceled, broken, no show for that week, for all providers of the office that must be followed up with by phone, text, or email.



The report will show the patients name, phone number, original date of appointment, emails, how many units of time the appointment was scheduled for, who the provider is, the services that need to be done, reason for cancellation and the fee for the service.

Screenshot:

CS SoftDent Software v17.1.1

TICKLER FILE LIST Linden Dental Associates, LDA, LLC.

For Provider: PRACTICE

Include Missed Appointments: Yes Include Planned Treatment: Yes
 Include Broken Appointments: Yes Include Manual Entries: Yes
 Include Canceled Appointments: Yes Include Family Recall: Yes
 Include Follow-Up Appointments: Yes Include Overlapped Appointments: Yes

Name	Phone Numbers	Original Date	Last Called	TU	Dr	Codes	Reason	Total Fee
Bivona, Gail M.	H: (732)382-7721 W: () - x C: (732)321-2697	01/09/20	//	8	25	CRPREP (02) CORE (02)	Cancelled Appt Note: Needs to sign up plan	1602.00
Williams, Denise	H: (908)925-2366 W: () - x C: (908)868-8707	01/15/20	//	6	25	AFRO	Cancelled Appt	137.00
Saunders, Shanice D.	H: (908)462-2720 W: () - x C: (908)472-2612	01/17/20	//	6	16	PCO2 (02, OL)	Cancelled Appt Note: 4.20	278.00
Bharley, Marjorie	H: (908)464-8716 W: (908)436-5000 x C: (908)868-8593	01/09/20	//	6	16	EXAM AFRO	Cancelled Appt Note: E, ec, ei	207.00
Brennan, Kevin C.	H: (908)464-8716 W: (908)436-5000 x C: (908)868-8593	01/10/20	//	6	18	AFRO	Cancelled Appt Note: E, ec, ei	137.00
Sumrein, Hadel	H: (908)486-6828 W: () - x C: (908)484-2857	01/02/20	//	6	20	AFRO	Broken Appt	137.00
Stumpf, Eva	H: (908)464-2546 W: (901)842-6200 x1185 C: (908)656-5117	12/30/19	//	6	25	PCO2 (05, DO) PCO2 (04, MO) PCO2 (03, MO)	Missed Appt Note: 17:00-18:00 AV	834.00
Carr, Michael	H: (732)868-9088 W: () - x C: (908)419-0458	01/02/20	//	2	25	9910	Missed Appt Note: 7:00 am - implant #3 no crown AV	95.00
Underwood, Bonnie	H: () - x W: (732)754-7822 C: (908)418-3122	01/08/20	//	6	35	PCO1 (03, O) PCO1 (30, B) PCO1 (31, O)	Cancelled Appt Note: Day have 2 ins verify lat or 7:00-20:00 AV	657.00
Byrne, Christopher	H: (908)418-3122 W: () - x C: (908)418-3122	01/02/20	//	6	25	EXAM AFRO	Broken Appt Note: Cal Score*	207.00
Parke, Lindsay	H: (908)486-6765 W: () - x C: (908)486-6765	12/30/19	//	6	25	QUAD (UR) QUAD (LL)	Missed Appt	578.00
Wynn, Douglas A.	H: (732)669-1217 W: () - x C: (848)219-6236	01/10/20	//	6	16	EXAM AFRO	Cancelled Appt	207.00
Boyanovsky, Anne	H: () - x W: () - x C: (917)880-4377	01/09/20	//	3	16	PCO1 (18, O)	Cancelled Appt	219.00
Escobar, Jacob	H: (908)465-8816 W: () - x C: (908)465-8816	01/08/20	//	6	16	AFRO	Cancelled Appt	137.00
Carala, Carolina	H: (908)605-4905 W: () - x C: (908)605-4905	01/11/20	//	6	31	EXAM AFRO	Cancelled Appt	207.00
Reyes, Joshua	H: () - x W: () - x C: (908)591-3665	01/04/20	//	6	22	EXAM AFRO	Broken Appt	207.00

Page 1

DR.D Sunday, April 19, 2020 09:01p: SCAN 9:02 PM 4/19/2020

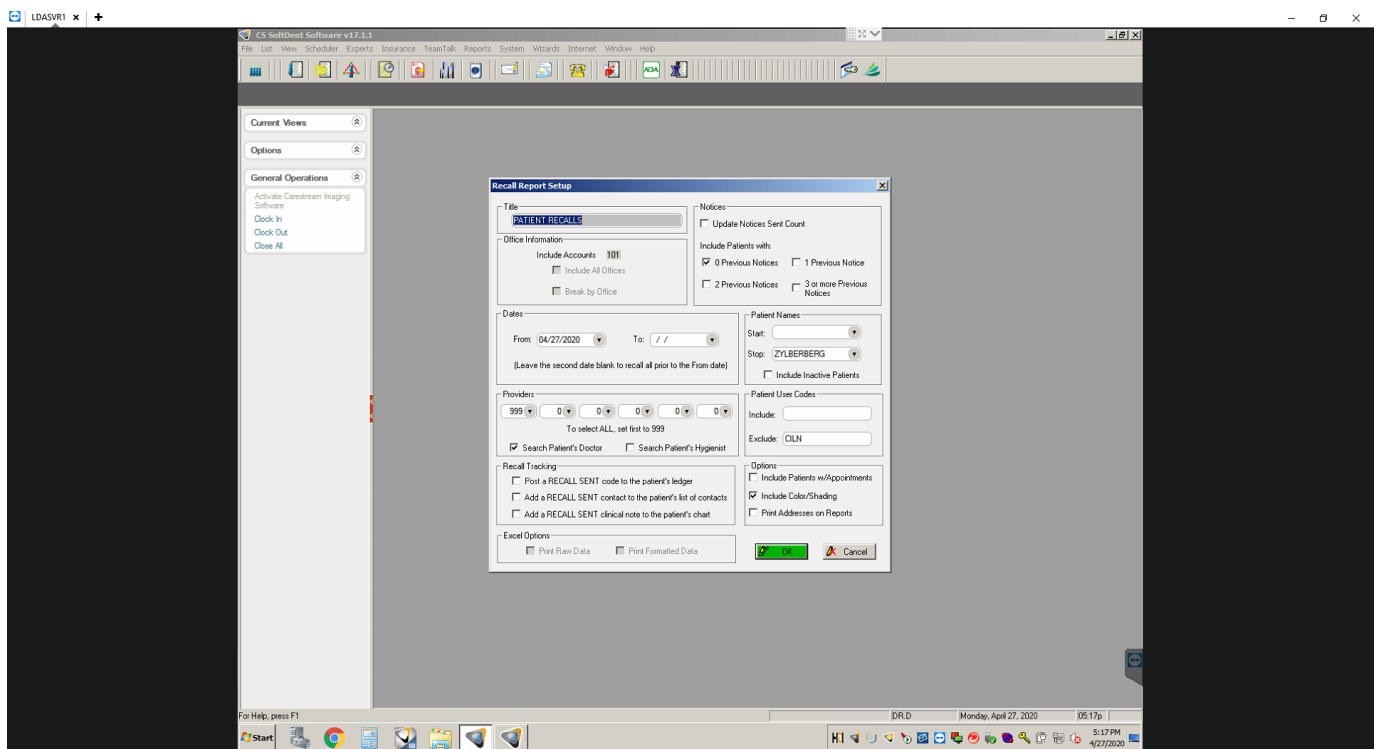
Recare & Recall Reports

Purpose:

Recare and recall reports are the list of patients without a continuing care hygiene appointment. By keeping up-to-date and working on this list consistently, we can ensure our patients are receiving the highest level of care while maintaining full hygiene schedules.

Steps:

Reports/ Recall/appts/X last hyg/Check Reports/Print Preview/Choose dates/ providers leave as 999/ Recall Tracking mark the box that says Add Recall Sent contacts into the patients list of contacts, everything else leave the same.



When you call the patients from recall list- you will follow the re-activation script

CS SoftDent Software v17.1.1 - (PATIENT RECALLS)

File List View Scheduler Experts Insurance TeamTalk Reports System Wizards Internet Window Help

PATIENT RECALLS

Current Views: PATIENT RECALLS

Options: Activate Carestream Imaging Software, Clock In, Clock Out, Close All

General Operations: Activate Carestream Imaging Software, Clock In, Clock Out, Close All

CS SoftDent Software v17.1.1 Linden Dental Associates, L.D.A., L.L.C.

PATIENT RECALLS

Recall All Before 03:27:39 Notices Sent Were Not Updated

For Patients due notice number 1 only

ID	Name	Phone Numbers	Recall Text	Act Bal	Ins	User Codes
920503	Tim Keywsh	H: (614)822-7779 W: () - x C: () -	Code: 100002 Age: 5 Interval: 6 Dr: 16 Last Reg: / / Reg: Due on or after: 04:21:20	-100.56		Yes
972801	Syed Abbas	H: () - W: () - x C: (640)482-1200 syed@live.com	Code: 100001 Age: 58 Interval: 6 Dr: 16 Last Reg: 11:02:18 Reg: Due on or after: 05:05:19	1052.41		Yes
124601	Karen Abbott	H: (903)321-0740 W: () - x C: () -	Code: 100001 Age: 56 Interval: 6 Dr: 16 Last Reg: 08:20:15 Reg: Erlia Stages Due on or after: 02:20:16	0.00		No
234204	Katherine Abdala	H: (903)654-0946 W: () - x C: (903)868-1505	Code: 100002 Age: 18 Interval: 6 Dr: 16 Last Reg: 12:21:15 Reg: Due on or after: 06:21:16	0.00		Yes HE
234201	Michael Abdala	H: (903)654-0946 W: (903)654-4618 x C: (903)868-1504	Code: 100001 Age: 54 Interval: 6 Dr: 16 Last Reg: 12:21:15 Reg: Due on or after: 06:21:16	0.00		Yes HE
234205	Vanessa Abdala	H: (903)654-0946 W: () - x C: (903)868-1505	Code: 100002 Age: 15 Interval: 6 Dr: 16 Last Reg: 12:21:15 Reg: Due on or after: 06:21:16	0.00		Yes HE
944801	Eliad Abdos	H: () - W: () - x C: () -	Code: 100001 Age: 56 Interval: 6 Dr: 16 Last Reg: / / Reg: Due on or after: 04:21:20	0.00		Yes
944802	Zariah Abdou	H: () - W: () - x C: (732)910-2911 zariah.abdou@live.com	Code: 100001 Age: 22 Interval: 6 Dr: 16 Last Reg: / / Reg: Due on or after: 04:21:20	0.00		Yes
112101	Bernard Abdes	H: (848)467-0317 W: () - x C: (848)467-0317 bernard14@gmail.com	Code: 100001 Age: 45 Interval: 6 Dr: 25 Last Reg: / / Reg: Due on or after: 04:21:20	0.00		Yes
989901	Shawna Abensavv	H: (201)463-8236 W: () - x C: (201)463-8236	Code: 100001 Age: 25 Interval: 6 Dr: 16 Last Reg: / / Reg: Due on or after: 04:21:20	0.00		Yes

Continued on next page...

created by: D.E.D Page 1 of 293 04:27:20 03:17p

Page 1 DRD Monday, April 27, 2020 05:20p SCAN

5:21 PM 4/27/2020

Reviewing Schedule Two Days In Advance

Purpose:

To help with the overall flow of the schedule, reviewing the schedule two days in advance in the morning huddle will allow all team members to review the schedule. This will allow them to see potential problems that can be fixed with this simple review.

Steps:

Schedule should be reviewed for the following:

1. The doctors schedule procedures in production column has the appropriate allotted units for the work, and the appropriate procedure code utilizing our inhouse codes.
2. The doctor sidebook schedule is according to the guidelines of what can be booked, time units, and the proper placement in relation to the main production column.
3. All lab work that is required is in the office
4. All doctors have an assistant or 2 to work their production column and sidebook column, and that each assistant has an hour lunch that does not disturb the doctors two columns.
5. If specilist is working- ask the assistant assigned to that specialist doctor if we have all the supplies needed for that day of work.
6. Make sure if doctor and hygienist are seeing the same patient on the same day that the flow works either from hygiene to doctor or doctor to hygiene.

Savings Plan & Membership Plans

Purpose:

To provide patients without insurance benefits discounts for the services and treatment they need, our office provides an in-office savings plan. By helping our patients financially, they can have optimal dental health and proceed with treatment diagnosed. These plans act similar to dental insurance plans and run on a yearly basis. Communication with the patients is necessary when they are in need of renewing their plans; calls are to be made to patient when they are scheduled for their recall and their plan is expiring.

Steps:

Our plan is called is called "LDA Membership", it is offered to all patient that do not have insurance.

NEW LDA Membership

If you are uninsured or underinsured, our in-house dental membership plan can help you save on treatments for you and your family. Enrolling is easy and benefits begin immediately.

Enroll today no waiting periods, no deductibles, and no exclusions on your care.

- Yearly membership fee is \$349.00 one person
- Yearly membership fee is \$649.00 two people
- Yearly membership fee is \$989.00 for a family (up to 4 individuals; additional family members are \$159 a person)

Names of Participating Plan Members:

1) _____ 2) _____
3) _____ 4) _____

- Yearly membership fee for Periodontal patients \$549 one person (If you're recovering from gum disease, the periodontal plan includes three to four cleanings per year, in addition to all of the benefits covered under the traditional plan.

If you need dental insurance, a membership with our traditional dental coverage plan can get you:

- 2 Exams per year* (not included exams with specialists)
- 1 Emergency exam per year * (not included exams with specialists)
- Any necessary x-rays (CT-scan and panoramic xray not included)
- 2 Cleanings
- 20% off dental work that needs to be done no matter what

*This reduced fee plan does not apply to any treatments performed by specialists outside the office

** If treatment is made using Care Credit, the discount is reduced to 10% off dental work

*** Coupons and special deals, and promotions cannot be used in combination with the 20% off. Patient will receive the large of the two discounts

Signature Acknowledgement

By signing this agreement, you are bound to the terms and conditions set herein. All payments are non-refundable. The plan is valid through the end of the calendar year and may only be used at Linden Dental Associates LDA LLC. This plan cannot be combined with any other regular dental insurance.

Signature: _____ Date: _____

LDA plan:

If a patient sign up for the above plan, make sure they sign the form, make a copy of the form give a copy to them keep the original, scan into documents titled LDA Membership and the month and year(ex: LDAmembership 5.2020). Attach the original copy with a stapler to the routing slip.

This is the way to enter in the LDA membership into Softdent:

1. Phone center/type your patient name/go to transactions(on the bottom of the screen)/when transaction window opens go to add/code 30.13/tab/ put in the appropriate fee \$349 or \$549(perio patient)/ Dr: should always be #16.
2. Enter Payment for the LDA membership: go to add/ code 3.94(check), 11.94(mastercard), 12.94(visa), 1 3.94(amex), 14.94(discover), 16.94(carecredit),/enter the appropriate fee \$___, the doctor:should always be #16
3. The following procedures ADA codes will need to be written off as they are part of the plan:
 - a. 2 exams a year(code 0120) write off by going to transactions/add/code50.98 and fee \$ amount of code 0120 should be entered/ the doctor needs to be changed to the doctor that performed the exam.
 - b. 1 emergency exam (code 0140) write off by going to transactions/add/code50.98 and fee \$ amount of code 0140 should be entered/ the doctor needs to be changed to the doctor that performed the exam..
 - c. X-rays (code 0220,0274,02330,0270,0210)write off by going to transactions/add/code50.98 and fee \$ amount of code for each x-ray that is completed/the doctor needs to be changed to the doctor that performed the exam.
 - d. 2 cleanings (1110,1120) write off by going to transactions/add/code50.98 and fee \$ amount of code 1110 and 1120 should be entered/the hygienist provider code needs to be changed to the hygienist that performed the cleaning.
 - e. All other procedures:
 - i. Enter into softdent the procedure code completed by the provider,(transactions/add/ADAcodes), change the provider to who completed the work.
 - ii. Enter into softdent the 20% off \$ amount for each procedure that was performed (transactions/add/code 50.98/change the provider who completed the work) put the amount in (ex: procedure cost is \$100,20% off is \$20 so you will enter \$20. In the note section you will write: 20%off what ADA code procedure its for(ex:2392 #2), and first and last initials of your name.
 - iii. Enter Payment for the LDA membership: go to add/ code 3.94(check), 11.94(mastercard), 12.94(visa), 1 3.94(amex), 14.94(discover), 16.94(carecredit),/enter the appropriate fee \$___, the doctor:should always be the doctor that performed the ADA procedure. In our case example you would enter (ex: 11.94 (mc) \$80 in the fee. In the note section you will write: ADA code procedure its for(ex:2392 #2), and first and last initials of your name.

Scanning Driver's License & Copying For Patient Picture

Purpose:

By scanning a current copy of the patient's insurance cards and driver's licenses, patient charts can be updated and kept current. Furthermore, the picture from the driver's license is cropped and added to digital patient charts for easy visual reference of who patients are.

Steps:

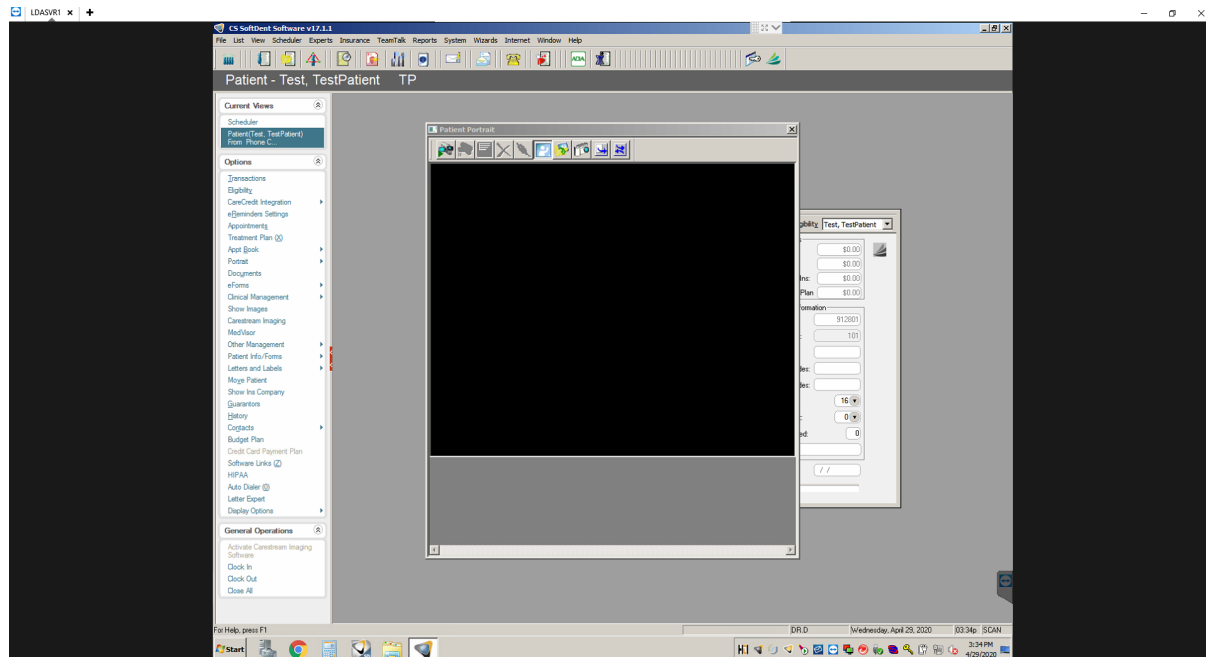
To scan the insurance card both sides (Duplex function on the scanner). Refer to How to Scan Documents.

Description of document should state: Ins Card

All insurance cards you want to scan using the Duplex function so that we can get both sides of the card scanned at the same time, if you scanner has that option, if it doesn't scan each side separately.

To scan the driver license you will go to:

1. Go to the yellow phone, type in the patients name,click on the patient information on the bottom of the screen.
2. Then on the left side of the screen you will click on portrait
3. Create portrait
4. Make sure the driver license is in the scanner
4. Go the button on top that has one blue arrow(2nd button from last)
5. You then want to press scan, once the id has went through the scanner softdent will prompt you if you want to continue scanning more documents at this point you want to no, then it will finish and open the id for you to view of what you just scanned, before you exit this screen you must press save the document on the top of the screen.
11. If you're scan is not eligible you may rescan again following the same protocols.
12. If the scanner gives you any error message often times you should unplug the cable from the scanner, shut down your softdent software, Then plug in the cord back into the scanner and log back into softdent and start all over.
13. The portrait from the id will now be viewable on the patients appointment card



Scanning Insurance Card

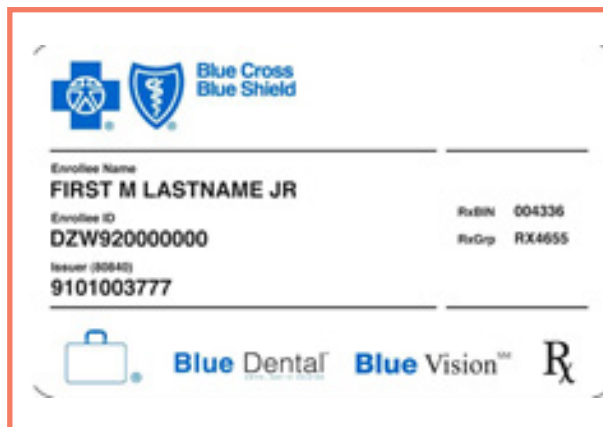
Purpose:

Scanning insurance cards allow our practice to document thoroughly, allowing any team members that are needing the information to obtain it later. Furthermore, by scanning the insurance card, the billing department can reference this for proper insurance billing.

Steps:

1. Go to the yellow phone, type in the patients name,click on the patient information on the bottom of the screen.
2. Then on the left side of the screen you will click on documents
3. it will open a screen that will ask you for a description of the document you will be scanning.
You will type the following in Description of Document: Ins Card
All insurance cards you want to scan using the Duplex function so that we can get both sides of the card scanned at the same time, if you scanner has that option, if it doesn't scan each side separately.
The next field will be defaulted to: Misc Patient Documents- leave as is
5. Then press OK
6. The next window will open where on the top right of the screen you will see four icons pop out you want to click on the third icon from the left with the blue arrow pointing to the left.
7. Another screen will pop open, where you will leave all fields as is except the duplex field, which if you want both sides printed leave the duplex field checked if you only want one side scanned you will un-check the duplex field.
8. The only thing we scan as a duplex is insurance breakdown forms and insurance cards.
9. Before you press the scan button make sure the paper side you are trying to scan should be faced down, and you should feel the scanner suck in the paper a bit, if you tug the paper gently and it doesn't come out of the scanner you have put in the paper correctly.
10. You then want to press scan, once the paper has went through the scanner softdent will prompt you if you want to continue scanning more documents at this point you want to say yes or no, if no then it will finish and open the document for you to view of what you just scanned, before you exit this screen you must press save the document on the top of the screen.
11. If you're scan is not eligible you may rescan again following the same protocols.
12. If the scanner gives you any error message often times you should unplug the cable from the scanner, shut down your softdent software, Then plug in the cord back into the scanner and log back into softdent and start all over.

Screenshot: *Place Picture Here*



Cancellations

Purpose:

To ensure consistency in monitoring and handling patient cancellations, our goal is to avoid the cancellation and get the patient seen. If this is unavoidable, the patient is to be rescheduled and seen at a suitable appointment time.

Verbiage:

"I am sorry to hear you have a schedule conflict, as you MAY know, we do require 48 hours notice for all appointment changes to avoid a missed appointment charge. Is there any way you can make this appointment? Dr _____ was really looking forward to seeing you at this time."

If the response is still unable to keep the appointment (**NEED TO CREATE DEMAND, and train the patients**)

"Let's find a time where you can for sure make it, because we want to reserve the time exclusively for you. UNFORTUNATELY we do not have an appointment for 6 weeks, so it's very important that we schedule you NOW"

Mrs. Jones, you are very important to us so I am going to put you at the TOP of my priority list

- **WAIT 3 WEEKS AND CALL PT**
- **MAKE A NOTE TO FOLLOW THROUGH AND CALL THE PATIENT BACK. There is no value if there is no follow through on our part.**

- ◇ **Reschedule but make sure to put them out 6 weeks, make a note in the appt card**
- ◇ **Bill out NS code on the ledger**
- ◇ **Record contact note in the patient contact notes**

Confirmations - Hygiene

Purpose:

To remind patients of upcoming appointments and ensure the schedule is kept full and running smoothly, our office confirms appointments 48 hours in advance. We call 48 hours in advance because we want to give our office time to refill any openings created instead of last-minute scrambling to fill our schedule.

Verbiage:

Speaking to the patient:

"Hi! This is _____ calling from _____. I was calling to confirm your dental cleaning appointment for Wednesday, October 22 at 10 am. Please note we do require a 48-hour notice for any appointment changes! Please remember to bring your photo ID and insurance card to the appointment. We look forward to seeing you on October 22 at 10:00 am."

Confirmations - Operative

Purpose:

To remind patients of upcoming appointments and ensure the schedule is kept full and running smoothly, our office confirms appointments 48 hours in advance. We call 48 hours in advance because we want to give our office time to refill any openings created instead of last-minute scrambling to fill our schedule.

Verbiage:

"Hi! This is _____ calling from _____. I was calling to confirm your dental appointment for Wednesday October 22 at 10 am with Dr. _____. Please remember to be on time for your appointment since we do not overbook our operative schedule and want to ensure you receive exceptional patient care. Please note we do require a 48 -hour notice for any appointment changes and look forward to seeing you on October 22 at 10:00 am."

Greeting Patients In The Office

Purpose:

Greeting our patients as if they are truly welcomed to our practice is an expectation for all team members in our practice. We want our patients to feel like VIPs and to know how much we value and care about them!

Verbiage:

"Hi, Mrs. Jones. It's great to see you today. Looks like we have you for 10:00. I'll let them know you are here. Please make yourself comfortable."

Insurance - In-Network?

Purpose:

To ensure that regardless of their insurance they carry, the caller is seen in our office as a new patient and treated with the best integrity for their dental health needs. Remember, even if you are out of network, the insurance company will still pay towards their treatment at your out of network fees.

Verbiage:

"Thank you for that information, we have quite a few patients with that same insurance carrier! While we are not in-network with _____(ins co), we will still bill them on your behalf and work to help collect everything they'll pay! Our patients have been really happy with our processes. We have an 8 am tomorrow morning that I can reserve for you. Would that work?"

Late Patients

Purpose:

We call patients within five minutes of their being late to the appointment scheduled. This is to notify them of the tardiness and find out how late they will be. If they will arrive with enough time to still be seen, notify the back office of when they'll be there. If they will be too late, reschedule the appointment and create demand and urgency for appointments.

Verbiage:

"Hi, Shelly? This is _____ with _____. I'm calling to make sure you're OK, we had you scheduled for an appointment that began about five minutes ago. Is everything alright? Are you near the office?"

Patient can make it with enough time:

"Perfect. We look forward to seeing you in 5 minutes. I'll be sure to let your hygienist know you are running a little behind."

Patient will be too late for the appointment:

"OK, good, I am glad to hear that you're alright. I'd like to get your appointment rescheduled now since we will not have time to see you today."

Two scenarios:

- The patient has a legitimate reason for missing the appointment- sick, death, funeral, emergency, etc.
 - "I am really sorry to hear that. It looks like I have next Tuesday at 9 am available for you. Would that work for me to reserve that time for you?"
- The patient does not have a legitimate excuse-- train our patients that our appointments are valuable-- push appointment out 4-6 weeks.
 - "I am really sorry to hear that. Our schedule is pretty full and my next available appointment for you is in 4 weeks on Wednesday, June 14 at 4:00. Let's reserve that time for you. If I have anything that comes up sooner, I will be sure to give you a call."
 - ◊ Make sure you make notes about the reason for being 4 weeks out and call the patient ONLY AFTER 2 weeks of waiting. We are training our patients!

Moving Appointments

Purpose:

Occasionally a patient has something come up in life, and the time they initially scheduled for doesn't work anymore. That's okay as long as there is a legitimate reason and they give us ample notice. We can find them a new time that will work both for them and us!

Verbiage:

"I understand completely, you have given plenty of notice so let's find you a new time to be seen! Is there a day or time that typically works the best with your schedule?"

New Patient

Purpose:

New patient calls are the calls that the practice is looking for. We need to make sure that we do not put these calls on hold, that we are accessible, and provide a great first impression to new patients looking to join our practice. These calls are the most important calls in our practice and should be treated as such.

Verbiage:

"Thank you for calling _____, this is Kiera. How may I help you?"

"Welcome to the area. How did you hear about our practice?" TRACK THIS REFERRAL INFO

"You made the right choice calling our office. Our patients love him/her and we are confident you will too! In order to make a proper appointment for you/your child, may I ask you a few questions? This should take about five minutes. Is this a good time for you?"

(If not, set up a time for you to call them back that's convenient for them: _____/_____)
As I mentioned earlier, my name is ____ What is your name? Well, ____ welcome!"

GRAB INTAKE FORM AND ANSWER ALL QUESTIONS! Follow the New Patient form protocol

New Patient Confirmation Calls

Purpose:

To ensure that our schedule is full and that patients come to their appointment times, confirmation calls 48 hours in advance are necessary. New patients need to be confirmed since they have not been to our practice and could be holding valuable spaces in our schedule. Be sure to use all forms of communications: phone calls, text messages, and emails to confirm these appointments.

Verbiage:

"Hi! This is _____ calling from _____. I was calling to confirm your dental appointment for tomorrow, Wednesday October 22 at 10 am.

Please remember to fill out paperwork that was emailed to you. If you are not able to fill out paperwork beforehand, please come 20 minutes before your appointment time so we can respect your appointment time and the appointment times of other patients. Please remember to bring your photo ID and insurance card to the appointment. We look forward to seeing you tomorrow, May 22 at 10:00 am."

Price Shopping

Purpose:

Sometimes patients get estimates from one office and want a second opinion. Other times, patients are looking for "deals" and call multiple offices to find the best discount. Our goal is to get price shopping patients to be seen unless we are certain they would not make a good fit for our office.

Verbiage:

Patient: "Hi, I'm wondering how much a _____ would cost at your office?"

Team member: "I am so glad you called! Our doctors are amazing at __. There are so many variables that it is difficult to give accurate pricing over the phone. The best approach would be to have you come in for a full exam with no obligation. You may not even need a_! We can even help save you time and money by finding out what's right for you. Would you prefer a morning or afternoon appointment?"

- Move onto NP scheduling

If patient is persistent about costs of procedures:

"Will you be using dental benefits?"

IF YES:

"Our office is proud to be in network with_ and you will receive the lowest allowed fee by your insurance in our office guaranteed. And your insurance will cover a significant% of your care. We would be proud to review that all with you when you come in. There really are so many variables that it is impossible to give you an exact cost over the phone. We are not sure you truly need __ .

(insert price range here) The great thing about our practice is that whether or not you have insurance we have payment plan to fit you budget."

IF NO:

Team member says: "There really are so many variables that it is impossible to give you an exact cost over the phone. We are not sure you truly need __ . (insert price here) The great thing about our practice is that whether or not you have insurance we have payment plan to fit you budget."

Crowns can run: \$900-1,400

Fillings can run: \$200-400

Extractions can run: \$300-500

Implants can run: \$ \$3500-4,000

Bridges can run: \$1,000-\$1400 per tooth

Dentures can run: \$1,000-1,900

Root Canals can run: around \$1000

Reappointments

Purpose:

Making sure all patients leave our practice with an appointment. This is the best level of care we can give our patients. Correct verbiage can help increase our reappointment percentages and our level of care.

Verbiage:

- Hygiene
 - "Alright Kiera, let's get you scheduled for that hygiene appointment. I see you like the afternoons. Those book up quickly. Let's get you scheduled for May 8 at 4 pm. Sound good?"
- Doctor treatment
 - "Hey Kiera, we need to get you back in about a week for about 1.5 hours for that crown on the lower right. I have Tuesday at 3 pm or Wednesday at 8 am. What works best for you?"

Recare Re-activation Calls

Purpose:

To provide up-to-date, accurate call lists used to fill future schedules and ensure our patients are receiving the highest quality dental care possible. We want to ensure we get all the patients in for their routine cleaning and exams.

Verbiage:

Reactivation script.....

Hi Mrs.....

If they answer: This is (Your name) from Linden Dental. I just wanted to let you know your Hygienist (Hyg name). Asked me to reach out to you, because our records show you are overdue for your cleaning checkup and she is concerned it's been over a year. Do you prefer morning or afternoon?

If they wish not to schedule an appt, please ask why?

If changed doctor: Say may I ask why? If they say they were unhappy, apologize and ask if there is anything we can do to make a better experience.

If they say no, leave it open to always come back and that our doors are open, if they would like to give us a second chance in the near future.

If the Moved: Good luck, if you are ever back in the area our doors are always open to welcome you back!!!

If insurance: Most insurance allows at least 2 free cleanings per year, would love to help you take advantage of that opportunity.

If no insurance say no problem we would love to see you, we are having a wonderful promotion that is only \$99 for your exam, x-rays and cleaning! Would you like to schedule an appointment?

If voicemail: This is (Your name) from Linden Dental. I just wanted to let you know your Hygienist (Hyg name). Asked me to reach out to you, because our records show you are overdue for your cleaning checkup and she is concerned it's been over a year.

If insurance on file: Most insurance allows at least 2 free cleanings per year, would love to help you take advantage of that opportunity. Please call us back at your earliest convenience so we can help set up your appt with us (leave our # and remind them where you're calling from)

If no insurance on file: We are having a wonderful promotion that is only \$99 for your exam, x-rays and cleaning! Please call us back at your earliest convenience so we can help set up your appt with us (leave our # and remind them where you're calling from)

Recare System – 2-2-2

Purpose:

To ensure proper follow-up for all patients without an appointment as well as documentation of calls, we have a method to call patients two days after they leave our practice, two weeks after that call and then two months after that call. If the patient still hasn't scheduled with the last call, sending a letter can be another form of communication. Be sure to remove this patient from the recare or unscheduled treatment lists once you have followed up with all three calls and the letter.

Verbiage:

"Hi _____. This is _____ calling from _____. We were calling because you are past due for your professional dental cleaning and exam and we would like to get you scheduled today. Do mornings or afternoons work best for you?"

SCHEDULE.

If they say no: "When would be a good time to call you back to make sure we are able to get you scheduled with your preferred time?"

WRITE THIS DOWN AND FOLLOW-UP

If they say no, don't call back- INACTIVATE patient and make notes

For voicemail: "Hi _____. This is _____ calling from _____. We are calling because you are overdue for your professional dental cleaning and exam. Your dental health is very important and we would like to get you scheduled today at your preferred time. Please call us back as soon as possible at _____ to reserve your spot as our schedule is filling up quickly. Thanks so much! Have a wonderful day!"

Referrals & Reviews

Purpose:

To provide our patients with exceptional customer service so that they refer their friends and family members to our practice. This is the best source of new patients and one that we rely heavily upon.

Verbiage:

- Referrals
 - "Kiera you are one of our favorite patients. We would love to get more patients like you. Would you refer your friends and family so we can build our practice with patients like you?"
 - "Hey Kiera, did you hear about our AWESOME referral program? We love patients like you that's why I'm telling you. If you will refer your favorite friends and family, we will give you AND them a gift card just to say thanks. PLUS- that paddle board upfront—yup! You get entered for it. All you have to do is refer your friends and family. The more you refer- the more we will reward you with our thank yous!"
- Getting reviews
 - "Hey Kiera, we are a growing practice and we would love a positive review on Google or Yelp from you. This is how we get great patients like you. It is so simple—just click here, or follow these steps to review us. We would really appreciate it."

Rescheduling

Purpose:

Sometimes patients need to reschedule their appointments. If they give us over 48 hours notice, we can reschedule them to a spot that works for them and our schedule. However, if it is less than 48 hours, we need to try to keep them in the schedule. Asking the right questions can help keep your schedule full and create value and urgency for the appointments in our practice.

Verbiage:

Hi Mrs. Jones. Do you need to move your appointment? What is going on?

LISTEN FOR THE ANSWER

“Oh man. That is really tricky. Well, I know you love the 8:00 appointments and Dr. _____ was really looking forward to seeing you tomorrow. Our next available appointment isn’t until (LIST THE DATE TWO MONTHS OUT AND AN INCONVENIENT TIME) August 10 at 2 pm. I know you love those 8:00 am and I would hate to push you out that far. Is there any way that you can keep this appointment?”

The patient says yes—keep the appointment.

The patient says no—“As you may know, we do require 2 business day for any appointment changes. I know this is the first time so let’s move you to that appointment in August. If anything comes up sooner, especially that 8:00 am appointment, I will be sure to call you.”

THIS ADDS VALUE AND LETS THEM KNOW!

MAKE SURE YOU ADD NOTES TO THE APPOINTMENT NOTE TO MOVE FORWARD FOR AT LEAST 4 WEEKS.
ADD TO ASAP LIST

The patient wants to call us back to schedule:

“Not even a problem. I would hate to forget about you. How would you feel if I just put you in the schedule in 6 months and hold the 8 am spot as a reminder for me to call you at that time? If it doesn’t work, we can always move it. Our schedule is really busy and I would hate not to get you in.”

Transitions & Introductions

Purpose:

Complete communication is paramount for exceptional patient care. The times that communication is paramount are the transitions and introductions as they transfer the power and trust from one person to the next. Having exceptional transitions will create a VIP experience for patients and better overall flow and communication among all team members.

Verbiage:

- From the front office to back office
 - "Hi, Mrs. Jones. Are you ready to come on back?" Escort patient to the operatory leading them the entire way.
 - "It looks like we are planning to do (LIST TREATMENT). Does that sound right? Did you have any questions? Have there been any changes in your health history since we last saw you? Let's get your blood pressure before I get the Dr."
- From the front office to hygiene
 - "Hi, Mrs. Jones. Are you ready to come on back?" Escort patient to the operatory leading them the entire way.
 - "It looks like we are planning to do (LIST TREATMENT). Does that sound right? Did you have any questions? Have there been any changes in your health history since we last saw you? Let's get your blood pressure before I get the Dr."
- From back office to Doctor
 - "Mrs. Jones. Here is Dr. _____. Dr. _____ Mrs. Jones is excited for that filling today. No changes in her medical history and her BP is _____."
 - DOCTOR: "Hi Mrs. Jones. It's great to see you. Everything looks good. Let's get you numb and get started on that filling. Do you have any fun plans for after the filling?"
- From hygiene to the doctor- NEW PATIENT
 - "Mrs. Jones, this is Dr. _____. Dr. _____ Mrs. Jones found us through Google reviews. She is an excellent patient and has great oral hygiene (FIND SOMETHING TO COMPLIMENT ON). I did mention to her that she has a dark spot on the LL that you would be checking."
 - DOCTOR: Shakes hand "Hi Mrs. Jones. It's great to meet you. I'm glad you found great reviews online for us. Welcome to our practice. Do you have any concerns that I could address for you?"
 - "Perfect. Let's take a look."
- From hygiene to the doctor- EXISTING PATIENT
 - "Mrs. Jones, Dr. _____ is here. Dr. _____, Mrs. Jones is doing a great job with her flossing this time. We were working on that and her numbers are really improving. She has some slight sensitivity on the LR and I took some IOs for you to review." Stand up and out of the way for the Dr. to sit down for the exam.
 - DOCTOR: "Hi Mrs. Jones. It's great to see you again. How is the summer traveling treating you? Great job on the flossing. Let's take a look at that sensitive area and get it taken care of."

- From the front office to back office
 - “Hi, Mrs. Jones. Are you ready to come on back?” Escort patient to the operatory leading them the entire way.
 - “It looks like we are planning to do (LIST TREATMENT). Does that sound right? Did you have any questions? Have there been any changes in your health history since we last saw you? Let’s get your blood pressure before I get the Dr.”
- From the front office to hygiene
 - “Hi, Mrs. Jones. Are you ready to come on back?” Escort patient to the operatory leading them the entire way.
 - “It looks like we are planning to do (LIST TREATMENT). Does that sound right? Did you have any questions? Have there been any changes in your health history since we last saw you? Let’s get your blood pressure before I get the Dr.”
- From back office to Doctor
 - “Mrs. Jones. Here is Dr. _____. Dr. _____ Mrs. Jones is excited for that filling today. No changes in her medical history and her BP is _____.”
 - DOCTOR: “Hi Mrs. Jones. It’s great to see you. Everything looks good. Let’s get you numb and get started on that filling. Do you have any fun plans for after the filling?”
- From hygiene to the doctor- NEW PATIENT
 - “Mrs. Jones, this is Dr. _____. Dr. _____ Mrs. Jones found us through Google reviews. She is an excellent patient and has great oral hygiene (FIND SOMETHING TO COMPLIMENT ON). I did mention to her that she has a dark spot on the LL that you would be checking.”
 - DOCTOR: Shakes hand “Hi Mrs. Jones. It’s great to meet you. I’m glad you found great reviews online for us. Welcome to our practice. Do you have any concerns that I could address for you?”
 - “Perfect. Let’s take a look.”
- From hygiene to the doctor- EXISTING PATIENT
 - “Mrs. Jones, Dr. _____ is here. Dr. _____, Mrs. Jones is doing a great job with her flossing this time. We were working on that and her numbers are really improving. She has some slight sensitivity on the LR and I took some IOs for you to review.” Stand up and out of the way for Dr to sit down for exam.
 - DOCTOR: “Hi Mrs. Jones. It’s great to see you again. How is the summer traveling treating you? Great job on the flossing. Let’s take a look at that sensitive area and get it taken care of.”
- From the Back office to front office post appointment
 - “Hi TC, Mrs. Jones is all set for today. We completed everything that is circled on the route slip: Fillings on #3, 4, and 5. We ended up adding #6-IL and that is added to the treatment plan. We need to get her back for her RECARE and it looks like her spouse needs to be scheduled as well. Lastly, she knows that the Dr. wants her back next week to get that crown completed for about 1.5 hours.”
 - ◊ To the patient, “Mrs. Jones- be careful not to bite yourself while you are numb. It was great to see you today. Do you have any questions for me? Look forward to seeing you next week.”
 - ◊ DISMISS YOURSELF
- From hygiene to front office post appointment
 - “Hi TC, Mrs. Jones is all set for today. We completed everything that is circled on the route slip: exam, x-rays, and SRP on the UR and LR. We need to get her back for her other SRP and I HAVE HER SCHEDULED FOR MONDAY AT 3 pm. If you could get her a RECEIPT for today’s visit, that would be great. “
 - ◊ To the patient, “Mrs. Jones- be careful not to bite yourself while you are numb. It was great to see you today. Do you have any questions for me? Look forward to seeing you next week.”
 - ◊ DISMISS YOURSELF

Unscheduled Treatment Calls

Purpose:

Making sure our patients are seen, in a timely manner, for treatment that was diagnosed, unscheduled treatment calls need to be made regularly and consistently. Utilizing the 2-2-2- method, these calls can be completed and followed-up on with a system that is concrete.

Verbiage:

"Hi Shelly, this is _____ at _____, calling to get you scheduled for your next dental appointment. Dr _____ noticed that we haven't seen you for _____ (TX needed) and would like me to help get you scheduled. Is there a time or day that works best with your schedule?"

Steps To Writing A Review

Purpose:

Having patients write reviews for our practice allows other patients to find us based on our online reputation. Verbiage listed below can help to obtain exceptional reviews from patients. "We are in the growing phase of business and would love your help. If you had a positive experience today, please take a few minutes to write us a review on Google and/or Yelp. The steps are listed below. Thank you for being a valued patient."

Steps:



- Open Google Maps and make sure you're signed in
- Search for a place:
- Schmidt Dental Center
- Scroll to the bottom of the information sheet, below the search box, click "Write a Review"
- In the window that appears, click the stars to score the place.
- Please write a comment too! We would LOVE your feedback!!!!



- Open Yelp.com in your browser
- At the top of the page in the FIND text box enter the name of the company
- Schmidt Dental Center
- Select the correct office you are looking for
- At the top right-hand side in RED select the button "WRITE A REVIEW"
- Select the star rating
- Up to 5 stars available
- Write a comment about your experience
- Click sign up and post
 - Create a login
 - Or just sign-in and post your review