

Scheduling Center Training Book

Updated: 11/02/2020



Clocking in and out

The screenshot displays the Open Dental software interface. On the left sidebar, the 'Manage' button (represented by a gear icon) is highlighted with a red box. The main window is divided into several sections:

- Top Menu:** Log Off, File, Setup, Lists, Reports, Tools, Clinics, eServices, Alerts (0), Help.
- Left Sidebar:** Apps, Family, Account, Treat Plan, Chart, Images, and the highlighted 'Manage' button.
- Time Clock Section:**
 - Employee Table:** A table listing employees and their current status.

Employee	Status
Alicia R Green	Home
Andrea Barnes	Working
Andrew Stubbs	Home
Ashlee Nielsen	Home
Ashley Lessar	Home
Ashley McCorkle	Working
Ashley Rasmussen	Home
Athena M Molina	Working
Blanca Molina	Working
Breia Curtis	Working
Brittany Walker	Working
Center Call	Working
Cristal Bruce	Home

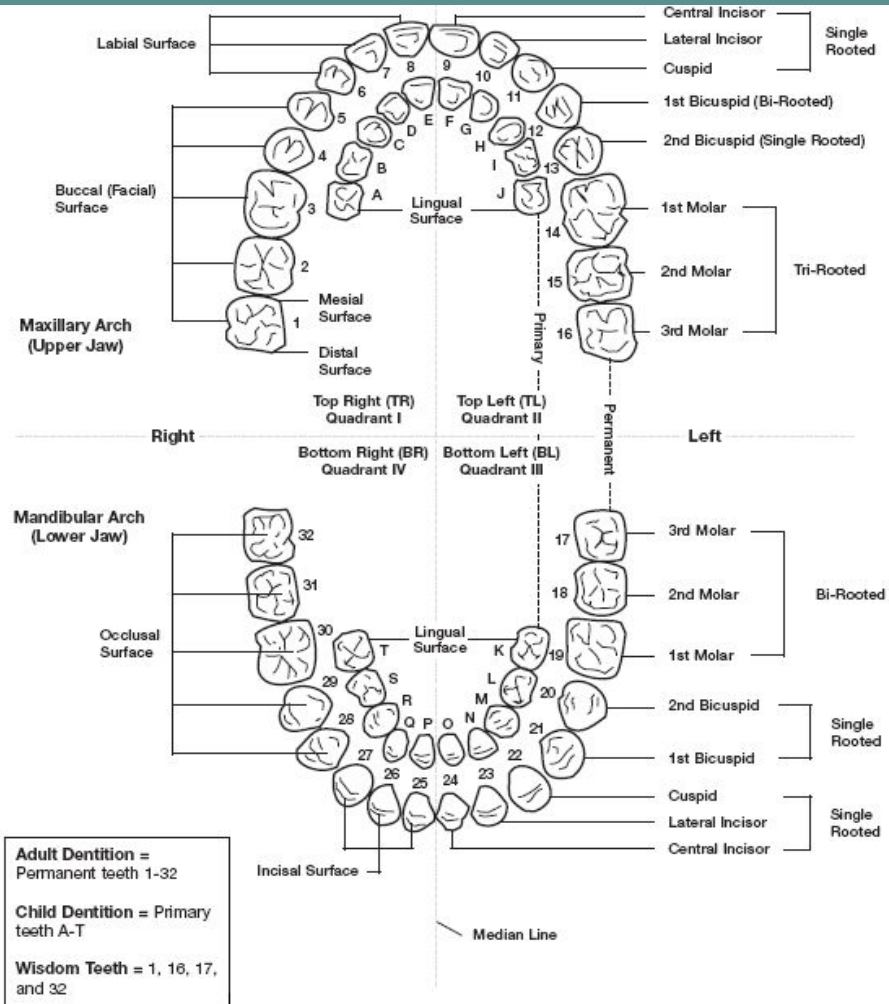
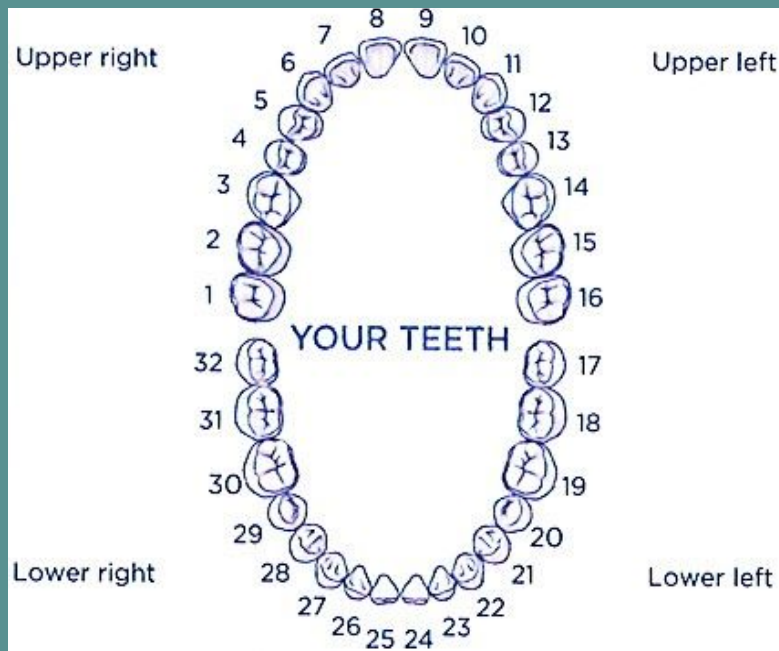
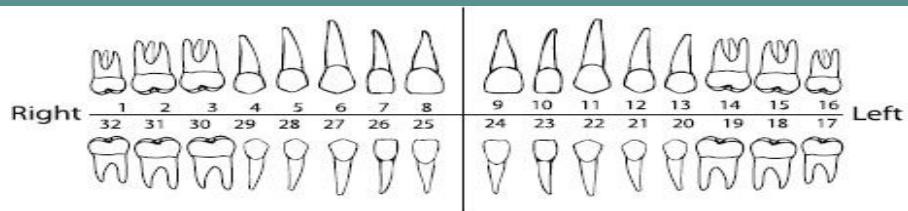
 - Buttons:** 'Manage', 'View Time Card', 'View Breaks', 'View Schedule', 'Clock In', 'Clock Out For:'. The 'View Time Card' button is highlighted with a red arrow.
 - Server Time:** 1:24:47.
- Messaging Section:** Includes fields for To, From, Extras, Message (& Send), and a 'Send Message' button.
- Message History Table:** A table with columns: To, From, Sent, Ack'd, Text.

◆ **Clocking in:** To clock into work, select the Manage button on your left side of Open Dental, make sure you are logged into your account when you do this. Select the clock in button when you arrive at work.

◆ **Clocking out:** If you are clocking out for home, select them home button, if your leaving outside of the building please select lunch or break,

◆ **View Time Card:** To look at your Time card select the View Time Card button, this will show you all your hours you have worked

◆ **Breaks:** The scheduling office doesn't take lunch breaks, we typically eat at our desks, if you needs to go and get food that is okay, please inform your co workers, and come back ASAP, make sure you clock out when you leave the building.



Workflow Checklist (for in-office employees)

- ❖ All in-bound calls
- ❖ Keep up-to-date on incoming emails to scheduling@stubbsdental.com
- ❖ Monday: Call all hygiene appointments for the week and confirm
- ❖ Mon-Thursday: Call all appointments for the next 48 hours and confirm
- ❖ Fridays: Call all appointments for Monday and Tuesday and confirm
- ❖ Send emails and texts to patients for unconfirmed appointments
- ❖ Call appointments marked as blue to be moved and rescheduled
- ❖ Lucid emails (sent by Alicia, found in Gmail)
- ❖ Simplifeye (Website chat follow-ups)
- ❖ AO4 consults to be rescheduled (Managed by Alicia, on Google Drive)
- ❖ Follow-Up Sheet / Data Capture (per Scheduling Institute, on Google Sheets)
 - Facebook Lead
 - Murray Location
 - AO4 Follow Up sheet
 - Follow Up Sheet/ Data Capture
 - Call Box Follow up Sheet
- ❖ Unscheduled treatment plan list (to get patients on the books for treatment)
- ❖ Unscheduled hygiene appointment list (patients that are due for a cleaning)
- ❖ Make New Patients Gifts

Operation of the phone



- ❖ **To transfer a phone call:** select the center button, that will then put the patient on hold. Use the keypad to dial the extension #, as soon as you brief the person answering, then push the transfer button on the left to immediately transfer the call.
- ❖ **Putting your phone on do not disturb:** Click the Menu button on the lower left, select the features option, scroll down to the Do Not Disturb button, select it, then select Enable
- ❖ **Menu Options:** Includes- Features settings, Status, settings, applications,
- ❖ **Hold button:** Click this button whenever you need to put a patient on hold
- ❖ **Dial button:** Select this button whenever you ready to dial a phone number when making a outbound call, or transferring a patient.
- ❖ **Volume buttons:** Use this change your volume on the phone
- ❖ **Mute button:** Select this button if you need to silence yourself on your line.
- ❖ **Speaker:** Select this button whenever you need to put someone on speakerphone

Scripts for Voicemails and Emails

We do ask that you limit visitors that you bring to your appointment. If you do need someone to drive you to your appointment, we ask that they wait in the car during your appointment. Once you are done with your paperwork, if we are not ready to take you back to your room we will also have you wait in your car until we are ready to take you back. We are trying to promote social distancing by minimizing the number of people we have in the office at one time.

Have you, or anyone in your immediate household, had a fever, cough, shortness of breath, chills or any other flu-like or upper respiratory symptoms in the past 72 hours?

Have you traveled outside of the country in the past two weeks to any of the following: China, Iran, Europe, UK?

Have you had any known exposure to anyone under investigation of, or pending testing or diagnosis of coronavirus?

----- Confirm Appointment on Voicemail COVID VERSION

Hello, this message is for **(PATIENT NAME)**. This is **(YOUR NAME)** giving you a call with Stubbs Dental. I'm calling to confirm your appointment for this **(DAY OF THE WEEK)** in our **(BOUNTIFUL/LAYTON)** office.

(IF NEW PT Since this is your first time in our office, please arrive 10-15 minutes early for new patient paperwork)

I'd also like to go over some pre-screening questions with you in regards to the covid19 virus, so if you could give me a call back, my phone number here is 801-939-5900.

----- Confirm Appointment with Email:

Hello **(PATIENT NAME)**,

We look forward to seeing you at your appointment on **(DAY OF THE WEEK, MONTH, DAY)** at **(TIME)**. Please reply to this email or call our office to confirm your appointment so that we may expect you. Our phone number is 801-939-5900.

Regards,

(IF NEEDED)

Since this will be your first time in our office, we ask that you come 10-15 minutes early to fill out some new-patient paperwork.

----- Confirm Appointment on Voicemail

Hello, this message is for **(PATIENT NAME)**. This is **(YOUR NAME)** giving you a call with Stubbs Dental. I was just calling to confirm your appointment for this **(DAY OF THE WEEK)** at **(TIME)** in our **(BOUNTIFUL/LAYTON)** office.

(IF NEW PT Since this is your first time in our office, please arrive 10-15 minutes early for new patient paperwork)

→ If you'd like to give me a call so that we can know to expect you, our number here is 801-939-5900. Thanks so much and I look forward to hearing from you soon.

New Patients, when confirming appointments:

“Please arrive 10-15 Minutes early to fill out your new patient paperwork.”

“Do you have a moment to go over your insurance information?”

(if they say they don't have insurance always put that in the notes so we don't ask again!)

Hello, this message is for **(PATIENT NAME)**. This is **(YOUR NAME)** giving you a call with Stubbs Dental. I was just calling to confirm your appointment for this **(DAY OF THE WEEK)** at **(TIME)** in our **(BOUNTIFUL/LAYTON)** office.

(IF NEW PT Since this is your first time in our office, please arrive 10-15 minutes early for new patient paperwork)

→ If you'd like to give me a call so that we can know to expect you, our number here is 801-939-5900. Thanks so much and I look forward to hearing from you soon.

There is a \$125 cancellation fee (*as needed for repeat offenders.*)

“Typically, without a 48 hour notice we would charge a cancelation fee of \$125, but let me get with my manager to see if we can waive it for you just this one time.”

If they answer, try to obtain:

- Name of Insurance Company
- Member ID #
- Group Name:
- Group #
- Employer:
- Patient Date of Birth
- Name of Primary Ins Holder
- Primary Ins Holder DOB
- Primary Ins Holder Employer

Online Paperwork

You will need to know your appointment date and time.

Go to: stubbsdental.com

Click “Menu”

Click “About Us”

Click “Patient Portal”

Fill out the information

Follow Up Verbiage

Rescheduling unscheduled treatment or consultations from unscheduled list:

Treatment: *This is _____ from Stubbs Dental. I was calling to see if you were ready to reschedule your appointment for “_____” with Dr. _____. Would you prefer a morning or an afternoon appointment?*

Consultation: *This is _____ from Stubbs Dental. I was calling to see if you were ready to reschedule your complimentary consultation for _____. Would you prefer a morning or an afternoon appointment?*

If leaving a voicemail: *Hello this message is for _____. This is _____ from Stubbs Dental. I would love to get your unscheduled appointment/consultation for _____ rescheduled for Please call us back at 801-XX-XXXX and just let us know we missed your original call. We look forward to hearing from you and taking care of your dental needs.*

When rescheduling no show/missed appointments, after a confirmed date and time:

We have reserved “_____” for you, I went ahead and waived the \$125 missed appointment fee for your previously missed appointment. If an emergency should arise will you give us a call 48 hours in advance to avoid this fee in the future?

-wait for an answer

When leaving a voicemail from a missed Call Box call:

Hello this message is for _____. This is _____ from Stubbs Dental. We saw that we missed your call and would love to know how we can help you today. Please call us back at 801-XX-XXXX and just let us know we missed your original call. We look forward to hearing from you and taking care of your dental needs.

When leaving a voicemail for a Facebook ad lead:

Hello this message is for _____. This is _____ from Stubbs Dental. Thank you for filling out our contact form on Facebook. I am calling to schedule your complimentary consultation so you can take advantage of our current special. Please call us back at 801-XXX-XXXX at your earliest convenience to schedule an appointment. We look forward to hearing from you and taking care of your dental needs.

When leaving a voicemail on Lucid/Einstein inquiries:

Hello this message is for _____. This is _____ from Stubbs Dental. Thank you for filling out our contact form on our website. We would love to schedule a complimentary consultation for you. Please call us back at 801-XXX-XXXX at your earliest convenience to schedule an appointment. We look forward to hearing from you and taking care of your dental needs.

-If the patient is wanting something other than a consult, state what type of appointment you are trying to schedule.

Rescheduling a patient due to internal issues: (try to avoid stating a reason why)

This is _____ from Stubbs Dental. I sincerely apologize, but I've been informed that we need to reschedule your upcoming appointment. I would love to find another date and time that will work for your schedule. Would you prefer a morning or afternoon?

Voicemail: Hello this message is for _____. This is _____ from Stubbs Dental. I sincerely apologize, but I've been informed that we need to reschedule your upcoming appointment originally scheduled for (date and time). Please call us back at 801-XXX-XXXX at your earliest convenience to reschedule this appointment.

Tips to reminder from SI:

- Don't pause, state all verbiage and go straight into dual alternative close.
- After scheduling, always end the call with:
 - The doctor and our team have you reserved (day) at (time) for you. We look forward to seeing you then. Should an emergency arise, will you call me? My name is _____ and let me know at least 48 hours in advance?

Hygiene Scheduling

New Patients

12 or older 70 Minutes

11 or younger 40 Minutes

Returning Patients

14 or older 60 Minutes

13 or younger 30 Minutes

Periodontal

SRP 90 Minutes

Maintenance 60 Minutes

All-on-4 Maintenance

Without Removal 60 Minutes

With Removal 90 Minutes

Bountiful

Dental Hygienist

Dawn (HY10)

Dental Assistants

Andrea (Lead) Dom,

Hailey, Danya, Brittany

Layton

Dental Hygienist

Ashley (HYG1)

Mandy (HYG2)

Dental Assistants

Kim (Lead), Shelby, Sarah, Susi

Last NP appt starting at 3:30 or earlier M-TH | 1:30 or earlier on Fridays.

* Exception: if the patient is new to hygiene but has been seen by the Dr. before *

HYG NEEDS EXTRA TIME WITH NP, SRP, AO4, or SNAP CLEANINGS

- ABSOLUTELY NOTHING ON THE OTHER SIDE OF A SEDATION -

Bountiful	Layton	Provider's Name	DEA ID	NPI #
DDS1	DDS1	Dr. David Stubbs (Oral Surgeon)	FS7314672	1588995377
DDS4	DDS2	Dr. James Willardson (TMJ Specialist)	FW6290112	1013080274
DDS5	DDS4	Dr. Shane Phillips	FP3863354	1700913894
DDS3	DDS3	Dr. Joseph K Kuchenmeister	FK3285512	1942564125
DD10	DDS8	Dr. Jordan Heimer	FH8042183	1336615244
		Dr. Douglas Loveland	BL2370738	1811045057
		Dr. Riley Robinson	FR9324055	1225691314
		Dr. Drew Phillips	FP8967804	1538796818
DDS7	DDS6	Dr. Daniel Bostock (Oral Surgeon)		

Select Patient ← Commlog E-mail

Appts

Family

Account

HYG1	
4am	
:10	
:20	
:30	
:40	
:50	
5am	General Blockout
:10	DR. WILLARDSEN 10:00 - 5:00
:20	DR. HEIMER 6:30 - 12:30
:30	DR. PHILLIPS 1:00 - 7:30
:40	No consults after 3:30PM
:50	
6am	DR. STUBBS MEET WITH ANDREW
:10	AND EMILY EVERY TUESDAY
:20	MORNING AT 8:00 AM
:30	
:40	

Search by:

Hint: enter values in multiple boxes.

Last Name

First Name

Phone (any)

Address

City

State

SSN

Patient Number

Chart Number

Birthdate

Subscriber ID

E-mail

Invoice Number

Billing Type

Clinic

☐ Guarantors Only

☒ Show Inactive Patients

☐ Show Archived/Deceased/Hidden Clinics

Search

☒ Refresh while typing

Add New Family:

Searching Patient

❖ Select Patient

➤ Right side

➤ Last Name

➤ First Name

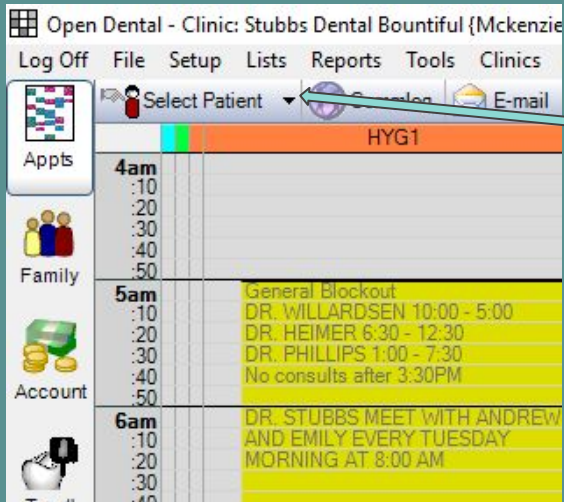
Searching Patients Other Ways

➤ Phone Number

➤ Date of Birth

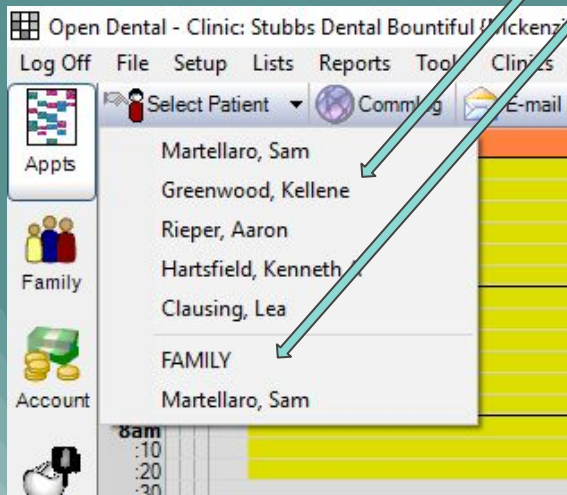
➤ Add Patient

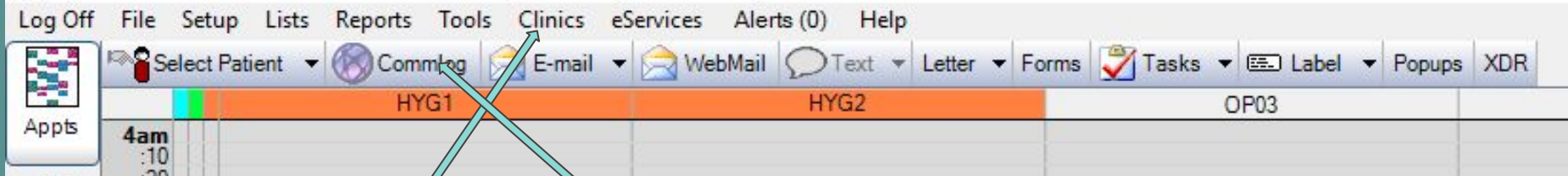
❖ ➤ Select the Add New Pt, or if its a family select Add Many



Recently Viewed Patient

- ❖ Next to the Select Patient there is a down arrow.
- ❖ Drop down shows the last 5 patient you have searched
- ❖ Shows the family members linked to the patient's name below



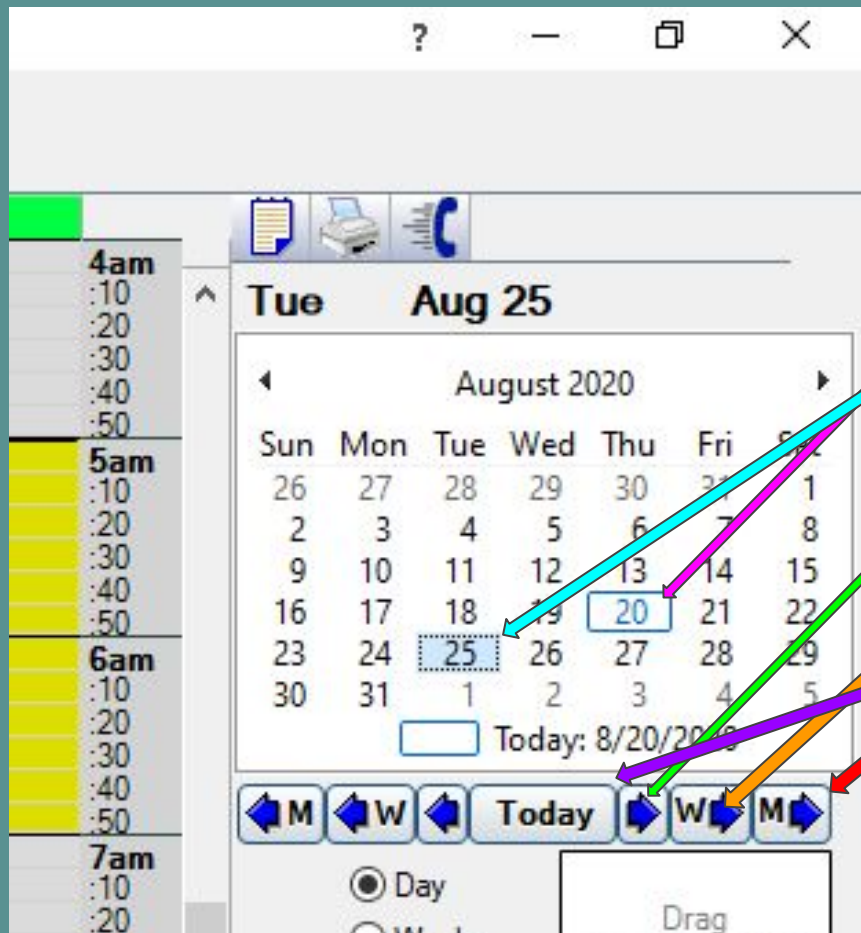


Switching Schedules/ Locations

- ❖ Bountiful Utah
- ❖ Layton Utah
- ❖ Murray Utah in Sep.

Commlog

- ❖ Notes not pertaining to an appointment.
- ❖ More in depth detailed notes.
 - List everything- "My favorite Color is Blue" "Pt recently moved to the area"



Calendar

- ◆ Outlined box is the current day
- ◆ Highlighted box is the day your schedule is showing
- ◆ Going to the next day you can hit the arrows or the date/number on the calendar
- ◆ “W” with arrow jumps you a Week forward
- ◆ “M” with arrow jumps you a Month forward
- ◆ Today sends you back to the current day

Family

Patient Information	
Last	Hutchins Miller
First	Patricia
Middle	
Preferred	
Title	
Salutation	
Status	Patient
Gender	Female
Position	Married
Birthdate	09/13/1970
Age	49
SS#	xxx-xx-2349
Address	373 E 6650 S
Address2	
City	South Weber
State	UT
Zip	84405
Hm Phone	(801)689-3155
Wk Phone	
Wireless Ph	(385)294-3447
E-mail	phhutchins@icloud.com
Contact Method	WirelessPh
ABCO	
Billing Type	Standard Billing - finance charges
Primary Provider	DDS3-2-Kuchenmeister, Joseph
Sec. Provider	None
Payor Types	
Language	
Referred From	Rasmussen, Ashley
Addr/Ph Note	
OtherPatID	
# Missed Appts	
Last Missed Appt	
Last Visit Date	2019-12-18
DriversLicense	
OtherPhone	
CellPhone	3852943447
Fax	
OptionalPatID	
LegacyPatNum	2026

Last Name
First Name

Gender

Position

Birthday




Age








Address







Phone Number

E-mail

Referred

 Appts
  Family
 

Select Patient  Commlog
  E-mail
  WebMail
  Text
  Letter
  Forms
  Tasks

Family Members:
  Add
  Delete
  Set Guarantor
  Move
  Add Insurance
  Discount Plan




Family Members					
Name	Position	Gender	Status	Age	Recall Due
Hutchins Miller, Patricia	Married	Female	Patient	49	
Miller, Craig Q	Single	Male	NonPatient	49	








Appts







- ❖ Gets you back to main calendar
 - To the last day you were on

Family Members Accounts

- ❖ Clicking on the family member name will switch you into their account
- ❖ Shows Relation Gender Status and Age

 Appts
  Family
 

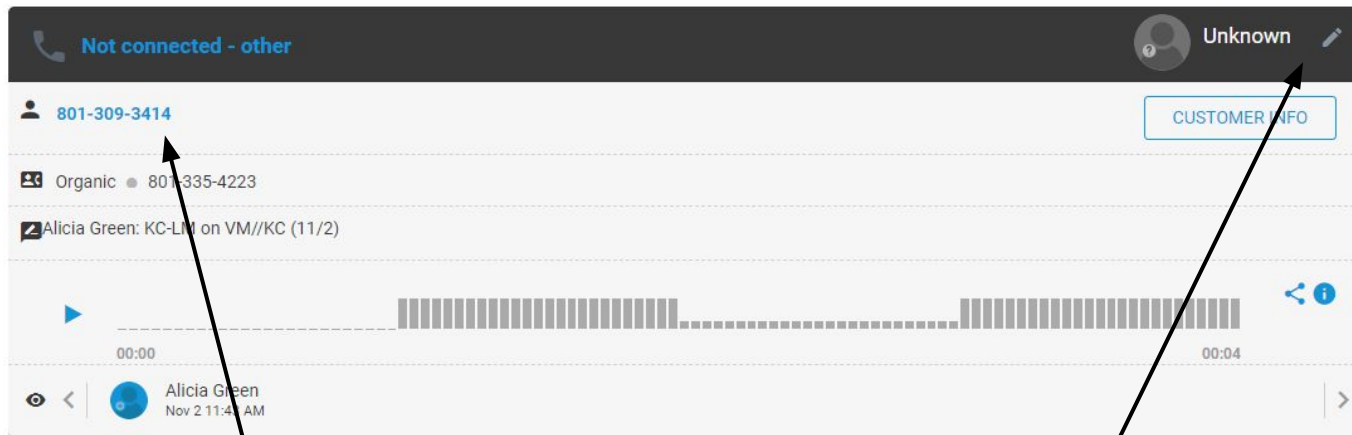
Select Patient  Commlog
  E-mail
  WebMail
  Text
  Letter
  Forms
  Tasks

Family Members:
  Add
  Delete
  Set Guarantor
  Move
  Add Insurance
  Discount Plan

Family Members					
Name	Position	Gender	Status	Age	Recall Due
Hutchins Miller, Patricia	Married	Female	Patient	49	
Miller, Craig Q	Single	Male	NonPatient	49	

Mon, Nov 2 - 11:05 AM

Stubbs Dental - Layton



- Email notification
 - Open
 - Click on review
 - Listen to the call
 - Search the BLUE phone number in Open Dental
 - If a pt read all notes to insure they havent call again or been called back
 - Call pt
 - Hello, this is _____ with Stubbs Dental we received a missed call from this number and I'm calling back to insure all your dental needs have been taken care of
 - After LM on VM or speaking with the pt leave a note

Making an Appointment

Making an appointment

- ❖ Click on +Make Appt

Viewing Appointments

- ❖ Click View Pat Appts

Where to find the ASAP List

The screenshot shows a medical software interface. At the top, there are icons for a calendar, a printer, and a phone. Below these is a header for 'Tue Aug 25'. A calendar for August 2020 is displayed, with the 25th highlighted. Below the calendar is a 'Today' button and a 'Today: 8/20/2020' label. To the left of the calendar are navigation buttons for months and years. Below the calendar is a section for 'Day' and 'Week' views, with a 'Clear' button. Below this is a 'View' dropdown menu set to 'none', with buttons for 'Lab Cases' and 'All Received'. Below the 'View' menu are buttons for 'Daily Prod' and 'Daily Goal'. At the bottom left is a list of appointment types: 'Unconfm', 'LeftMsg', 'Confirmed', 'MsgFam', 'Arrived', 'Ready', 'In Room', and 'FrontDesk'. To the right of this list are buttons for '+ Make Appt', 'Make Recall', 'Fam Recall', and 'View Pat Appts'. At the very bottom are tabs for 'Waiting', 'Emp', 'Prov', and 'Reminders'.

Family Members

Recall Date- Next HYG Appt

Past Appt (Complete, Broken, UnScheduled)

Making A New Appt

Appt Already Scheduled

Clipboard- UnScheduled, getting Rescheduled

Appointments for Manchego, Ricky

Recall for Family

Family Member	Age	Gender	Due Date	Scheduled
Ricky Manchego	39	Male		

☐ Planned Appt Done ☐ Show Completed Planned Appts

Appointment Module Note

Family Urgent Financial Notes

Appointments for Patient

Appt Status	Prov	Clinic	Date	Time	Min	Procedures	Notes
Complete	DDS4	Bountiful	09/12/2019	10:00 AM	60		Consult - Wed - Sep 11, 2019 - Confirmed apt with pt. MM - Tue - Sep 3, 2019-patient says that he is bad shape in his mouth and wants to come now that he has insurance, he will call back with insurance info, he has Cigna/kcas
Complete	DDS2	Bountiful	09/19/2019	12:00 PM	180		PrePC#31, RC-molar#31 RCT \$ 400 and bld up \$200 = \$ 600 Okay w/ Dr. Serr See if they can move up to 12pm KE - Mon - Sep 16, 2019 -patient is ready to get this done/kcas
Scheduled	DD10	Bountiful	08/26/2020	8:30 AM	90	Consult	08/21/2020- Possible same day work. Pt called and loved his last Dr. here (he was super nice and considerate of how he felt). He said he needs a RC but he has not been seen in way over 6 months. Pt no longer has dental insurance/MIC

Entire Family

Go To Appt Date Copy To Pinboard Schedule Recall NOTE for Patient Create New Appt Close

Scheduling a New Appointment

Select procedure

- ❖ Consult
- ❖ Cleanings
- ❖ Other

- AO4 Consults
- Emergency
- Post Op
- AO4 Cleanings

Appt Notes

- ❖ Ctrl D- Date
- ❖ Anything the Dr. need to know
- ❖ End with approval and // (your initials)

Edit Appointment - Ricky Manchego on Monday, 01/01/0001 12:00:00 AM

1 2
0:30

Patient Info

First Name: Ricky
Last Name: Manchego
Middle Initial:
Birthdate: 02/14/1981
Home Phone: (801)604-7187
Work Phone: (801)604-7187
Wireless Phone:
Credit Type:
Billing Type: Standard Billing - finance charges
Total Balance: 0.00
Address and Phone Notes:
Family Balance: 0.00
Est. Patient Portion: 0.00
Fee This Appt: 0.00

Appt Fields

Status: UnshedList
ASAP: ☐
Unshed Status: none
Confirmed: ☐
New Patient: ☐
Clinic: Bountiful
Provider: DD10
Hygienist: None
Is Hygiene: ☐ (use hyg color)
Assistant: none
Time Locked: ☐
Color: none
Appointment Type: None
Time Ask To Arrive:
Time Arrived:
Time Seated:
Time Dismissed:
Lab:
InsPlan 1: Cigna
InsPlan 2:
Appointment Note:
08/21/2020- NP- Pt needs to have cavity looked at. Time and Date approved by (initials)// (your initials)

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

CompEx-4BW-Pano-Pro-Rc
CompEx-2BW-Pano-ChPro
PerEx-4BW-Pro-Flu
PerEx-2BW-ChildPro-Flu
LimEx-PA
Comp Exam
Per Exam
Lim Exam
1 PA
2BW
4BW
Pano
Pro Adult
Fluor Adult
Pro Child
Fluor Child
PostOp
DentAdj
Consult
xx001
xx1m2
xx002
xx999
xx1cA
xx1cB
xx1cC
xxall

Delete + Add Attach All

Procedures on this Appointment

Stat	Priority	Tth	Surf	Code	Description	Fee
TP	1	28	MOD	D2393	resin-based composite - three surfaces, posterior	150.00
TP	1	29		D6010	surgical placement of implant body: endosteal implant	1174.00
TP	1	29		D6057	custom fabricated abutment - includes placement	447.00
TP	1	29		D6058	abutment supported porcelain/ceramic crown	833.00
TP	1	29		D9115	Seat Crown	0.00
TP	1	30		D6010	surgical placement of implant body: endosteal implant	1174.00
TP	1	30		D6057	custom fabricated abutment - includes placement	447.00
TP	1	30		D6058	abutment supported porcelain/ceramic crown	833.00
TP	1	30		D9115	Seat Crown	0.00
TP	1	31		D4212	gingivectomy or gingivoplasty to allow access for restorative procedure, per tooth	120.00
TP	1	31		D4266	guided tissue regeneration - resorbable barrier, per site	272.00
TP	1	31		D5821	interim partial denture (mandibular)	299.00
TP	1	31		D6010	surgical placement of implant body: endosteal implant	1174.00
TP	1	31		D6010	surgical placement of implant body: endosteal implant	1174.00
TP	1	31		D6057	custom fabricated abutment - includes placement	447.00

Communications Log - Appointment Scheduling

Date/Time	Description
05/18/2020	Primary Insurance Used: \$0.00 Secondary Insurance Used: \$0.00
08/21/2020	08/21/2020- Possible same day work. Pt called and loved his last Dr. here (he was super nice and considerate of how he felt). He said he needs a RC but he has not been seen in way over 6 months. Pt no longer has dental insurance/MC

Comm
Text
Audit Trail
To Task List
Delete
OK
Cancel

Confirming appt (24 hrs before)

- ❖ Pt name, appt date and time
- ❖ Appt status (confirmed ●, unconfirmed ○, left msg ●, move appt ●, etc.)
- ❖ Pt phone number and DOB (if needed to verify)
- ❖ Voicemail script - "Hello, this message is for (Patient Name). This is (Your Name) calling from Stubbs Dental. We were just calling to confirm your appointment tomorrow, (Day of the week and date of month) at (Time) (+10-15 mins for NP paperwork) in our (Bountiful/Layton) office. If you would please give us a call back so that we can know to expect you, our number is 801-335-4223."

Edit Appointment - Ricky Manchego on Monday, 01/01/0001 12:00:00 AM

0:30

Patient Info		Status	Unscheduled Status	Confirmed	New Patient	Clinic	Provider	Hygienist	Is Hygiene	Assistant	Time Locked	Color	Appointment Type	Time Ask To Arrive	Time Arrived	Time Seated	Time Dismissed	Lab	InsPlan 1	InsPlan 2	Appointment Note
First Name	Ricky	UnschedList	none			Bountiful	DD10	None	<input type="checkbox"/> (use hyg color)	none		none	None						Cigna		
Last Name	Manchego																				
Middle Initial																					
Birthdate	02/14/1981																				
Home Phone	(801)604-7187																				
Work Phone	(801)604-7187																				
Wireless Phone																					
Credit Type																					
Billing Type	Standard Billing - finance charges																				
Total Balance	0.00																				
Address and Phone Notes																					
Family Balance	0.00																				
Est. Patient Portion	0.00																				
Fee This Appt	0.00																				

Procedures on this Appointment						
Stat	Priority	Tth	Surf	Code	Description	Fee
TP	1	28	MOD	D2393	resin-based composite - three surfaces, posterior	150.00
TP	1	29		D6010	surgical placement of implant body: endosteal implant	1174.00
TP	1	29		D6057	custom fabricated abutment - includes placement	447.00
TP	1	29		D6058	abutment supported porcelain/ceramic crown	833.00
TP	1	29		D9115	Seat Crown	0.00
TP	1	30		D6010	surgical placement of implant body: endosteal implant	1174.00
TP	1	30		D6057	custom fabricated abutment - includes placement	447.00
TP	1	30		D6058	abutment supported porcelain/ceramic crown	833.00
TP	1	30		D9115	Seat Crown	0.00
TP	1	31		D4212	gingivectomy or gingivoplasty to allow access for restorative procedure, per tooth	120.00
TP	1	31		D4266	guided tissue regeneration - resorbable barrier, per site	272.00
TP	1	31		D5821	interim partial denture (mandibular)	299.00
TP	1	31		D6010	surgical placement of implant body: endosteal implant	1174.00
TP	1	31		D6010	surgical placement of implant body: endosteal implant	1174.00
TP	1	31		D6057	custom fabricated abutment - includes placement	447.00

Communications Log - Appointment Scheduling	
Date/Time	Description
05/18/2020	Primary Insurance Used: \$0.00 Secondary Insurance Used: \$0.00
08/21/2020	08/21/2020- Possible same day work. Pt called and loved his last Dr. here (he was super nice and considerate of how he felt). He said he needs a RC but he has not been seen in way over 6 months. Pt no longer has dental insurance/MC

Buttons: Delete, Add, Attach All, Comm, Text, Audit Trail, To Task List, Delete, OK, Cancel

Edit Appointment - Ricky Manchego on Monday, 01/01/0001 12:00:01 AM

1.2

0.30

Patient Info

First Name: Ricky
Last Name: Manchego
Middle Initial:
Birthdate: 02/14/1981
Home Phone: (801)604-7187
Work Phone: (801)604-7187
Wireless Phone:
Credit Type:
Billing Type: Standard Billing - finance charges
Total Balance: 0.00
Address and Phone Notes:
Family Balance: 0.00
Est. Patient Portion: 0.00
Fee This Appt: 0.00

Appt Fields

Status: UnschedList
ASAP: ☐
Unscheduled Status: none
Confirmed: ☐
New Patient: ☐
Clinic: Bountiful
Provider: DD10
Hygienist: None
Is Hygiene: ☐ (use hyg color)
Assistant: none
Time Locked: ☐
Color: none
Appointment Type: None
Time Ask To Arrive:
Time Arrived:
Time Seated:
Time Dismissed:
Lab: ☐
InsPlan 1: Cigna
InsPlan 2: ☐

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

Procedures on this Appointment

Stat	Priority	Tth	Surf	Code	Description	Fee
TP	1	28	MOD	D2393	resin-based composite - three surfaces, posterior	150.00
TP	1	29		D6010	surgical placement of implant body - endosteal	1174.00
TP	1	30		D6067	custom fabricated abutment - includes placement	447.00
TP	1	29		D6068	abutment supported porcelain/ceramic crown	833.00
TP	1	29		D9115	Seat Crown	0.00
TP	1	30		D6010	surgical placement of implant body - endosteal implant	1174.00
TP	1	30		D6067	custom fabricated abutment - includes placement	447.00
TP	1	30		D6068	abutment supported porcelain/ceramic crown	833.00
TP	1	30		D9115	Seat Crown	0.00
TP	1	31		D4212	gingivectomy or gingivoplasty to allow access for restorative procedure, per tooth	120.00
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TP	1	31		D6010	surgical placement of implant body - endosteal implant	1174.00
TP	1	31		D6067	custom fabricated abutment - includes placement	447.00

Communications Log - Appointment Scheduling

Date/Time	Description
05/18/2020	Primary Insurance Used: \$0.00 Secondary Insurance Used: \$0.00
08/21/2020	08/21/2020: Possible same day work. Pt called and loved his last Dr. here (he was super nice and considerate of how he felt). He said he needs a RC but he has not been seen in way over 6 months. Pt no longer has dental insurance/MC

Appointment Note

Changing Provider in the Appt

- ❖ Click the three little dots
- ❖ Click on Providers Name
- ❖ Click OK

Providers

Abbrev	LName	FName
DDS1	Stubbs	David D.
ALL4	On 4	All
DD10	Heimer	Jordan
DDS2	Temp Doc	Temp Doc
DDS4	Willardsen	James
DDS5	Phillips	Shane
DDS6	Hartvigsen	Darin
DDS7	Bostock	Daniel
DDS8	Hansen	Preston
DDS9	Greaves	Jesse
HY10	Newman	Dawn
HYG1	Rasmussen	Ashley
HYG3	TEMP	TEMP
KUCH	Kuchenmeister	Kris
SDNSB	Stubbs Dental	
SSED	Stubbs	Sedation
3333	Assistant Time	Assistant Time
DDS3-2	Kuchenmeister	Joseph
ANTS-2	Assitant	Assitant
AUST-2	Austin	Blaine
DDS1-2	Stubbs	David
DDS2-2	Willardsen	James
DDS4-2	Phillips	Shane
DDS5-2	Temp	Doctor
DDS6-2	Bostock	Daniel
DDS7-2	Hansen	Preston
DDS8-2	Heimer	Jordan
HYG1-2	Rasmussen	Ashley
PHIL-2	Coordinator	Finances
ROBE-2	Roberts	Greg
SDNSL	Stubbs Dental	
SSED-2	Sedation	
TEMP-2	Temp	Hyg
Robinson	Robinson	Riley
DPhillips	DPhillips	Drew
HYG2	Floyd	Mandi
Loveland	Loveland	Douglas

OK

Cancel

Changing Provider

Open Dental - Clinic: Stubbs Dental Bountiful (MckenzieC) - Hartsfield, Kenneth A - 4079

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

Select Patient Commlog E-mail WebMail Text Letter Forms

HYG1 HYG2

4am :10 :20 :30 :40 :50

5am :10 :20 :30 :40 :50

6am :10 :20 :30 :40 :50

7am :10 :20 :30 :40 :50

8am :10 :20 :30 :40 :50

9am :10 :20 :30 :40 :50

10am :10 :20 :30 :40 :50

11am :10 :20 :30 :40 :50

12pm :10 :20 :30 :40 :50

1pm :10 :20 :30 :40 :50

2pm :10 :20 :30 :40 :50

Options Add Task List Add Task Search Manage Blocks

for MckenzieC New for MckenzieC Patient Tasks (0) Main Reminders

General Blockout
DR. WILLARDSSEN 10:00 - 5:00
DR. HEIMER 6:30 - 12:30
DR. PHILLIPS 1:00 - 7:30
No consults after 3:30PM

DR. STUBBS MEET WITH ANDREW AND EMILY EVERY TUESDAY MORNING AT 8:00 AM

Beebe, Jaynee
CompEx, Bbox4, Pano, Prophyl, FL Varn
08/03/2020 - cleaning. Pt called to schedule her cleaning. Pt can only be seen Mondays and Tuesdays after 8 but before noon/MC
Berry, John
Varnish

Gunn, Tyler
Prophy
07/28/2020 - Pts mother called in and said pt has an ear infection. wont be able to make his apt/MC
07/25/2020 - Pts mom (Jessica Gunn) sh

Parker, Roseanne
UL-PerSc4+, LL-PerSc4+
COLLECT 212

Pond, McKenzie
CC Ad. Ba
CC Ad. Ba
- Tue - Feb 25, 2020 -

Toone, April
CC Ad. Ba
CC Ad. Ba
- Wed - Feb 19, 2020 -

Hunter, Patrick
CompEx, Bbox4, Pano, Prophyl, FL Varn

General Blockout

Reading the Provider's Schedule

Blockouts

Open Dental - Clinic: Stubbs Dental Bountiful (MckenzieC) - Hartsfield, Kenneth A - 4079

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

Select Patient Commlog E-mail WebMail Text Letter Forms

HYG1 HYG2

4am :10 :20 :30 :40 :50

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No consults after 3:30PM

DR. STUBBS MEET WITH ANDREW AND EMILY EVERY TUESDAY MORNING AT 8:00 AM

Keep Providers in their ops

Pink- Assistant Time

Green & Yellow- Sedation

Bountiful	Layton	Provider's Name	DEA ID	NPI #
Any Op	DDS1	Dr. David Stubbs (Oral Surgeon)	FS7314672	1588995377
Op 5 & 6- Bountiful	DDS4	Dr. James Willardson (TMJ Specialist)	FW6290112	1013080274
Op 5 & 6- Layton	DDS5	Dr. Shane Phillips	FP3863354	1700913894
Op 3 & 4- Layton	DDS3	Dr. Joseph K Kuchenmeister	FK3285512	1942564125
Op 3 & 4- Bountiful	DD10	Dr. Jordan Heimer	FH8042183	1336615244
Op 2- Layton		Dr. Douglas Loveland	BL2370738	1811045057
Any Op-Bountiful		Dr. Riley Robinson	FR9324055	1225691314
Any Op-Bountiful		Dr. Drew Phillips	FP8967804	1538796818
Any Op	DDS7	Dr. Daniel Bostock (Oral Surgeon)		

Texting Patients

Website - reminders.bearbonesit.com

1 hour after scheduling - pt receives automatic "save the date" email

2 hours after scheduling - pt receives automatic "save the date" text

Confirming appointment - pt receives automatic email 2 days before asking them to confirm. pt receives automatic text 5 days before asking them to confirm.

Hygiene recall- pt receives automatic email reminder that it is time to schedule their next cleaning

Missed appt - pt receives automatic text 1 hr after asking to call the office and reschedule

Bear Bones IT Bear Bones IT
- powered by
ReminderDental

Search Patients... 🔍

MAIN MENU

Dashboard

Appointments

Patients

Request Feedback

Phone Audio

Communication

Reports

Settings

Help Resources

Feature Requests

Feature Playground

Support Tickets

Dashboard

Schedule Toggle Weekend Today

Aug 17 – 21, 2020

< > Day Week Month

	Mon 8/17	Tue 8/18	Wed 8/19	Thu 8/20	Fri 8/21
9:30am		Elaine Winslow Confirmed	Samuel Cole Confirmed	Richard Stoltz Confirmed	Sharon Latson Confirmed
10am		Walter Albright Confirmed	Yoonn Hamrin Confirmed	Jill Sanders Confirmed	Geoffrey S. Confirmed
10:30am					
11am			Antoin Edson Confirmed	Robert Kay Confirmed	Robert Kay Confirmed
11:30am					
12pm					
12:30pm					
1pm					
1:30pm					
2pm					
2:30pm					
3pm					
3:30pm					
4pm					
4:30pm					
5pm					

Action Items ?

Friday - August 21st Total Patient Due: \$1443.00

7:00 am | Cindy Beck
Schedule: Prophylaxis

7:00 am | Daryl Babcock
Missing: Email

7:00 am | Rodney Wilyerd
Missing: Email
Schedule: Prophylaxis

0-30 Days: \$205
Patient Portion: \$205

7:00 am | MARISOL SALINAS
Missing: Email
Schedule: Prophylaxis

Message Activity ?

More

Brooke Houch

Message-delivered - Friday August, 21st 10:30 AM

Brooke, We look forward to seeing You for your dental appointment today at 12:30 PM. For directions click here: <https://appt.mx/r/BPKK>

Richard rick Pope

Message-delivered - Friday August, 21st 10:30 AM

Please Reply YES to confirm your appointment with Stubbs Dental on Wed, Aug 26th, 2020 at 12:30 PM. Please note, we require 48 hours advance notice to change or cancel your reserved time in order to waive the missed appointment fee.

Luis A Funes

Friday August, 21st 10:30 AM

Confirmed

Quick Responses



Sooner if possible



Inclimate weather
cancelation



Provider out of the
office



Emergency appt
cancelation



Canceled
appointment



Bountiful address



Insurance reply



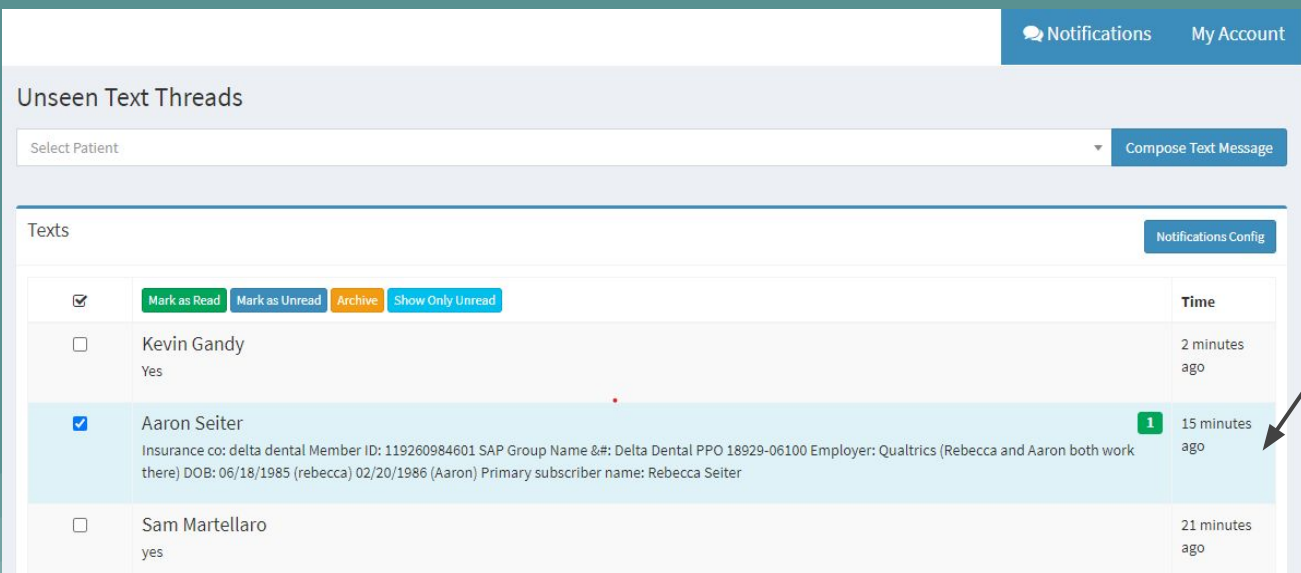
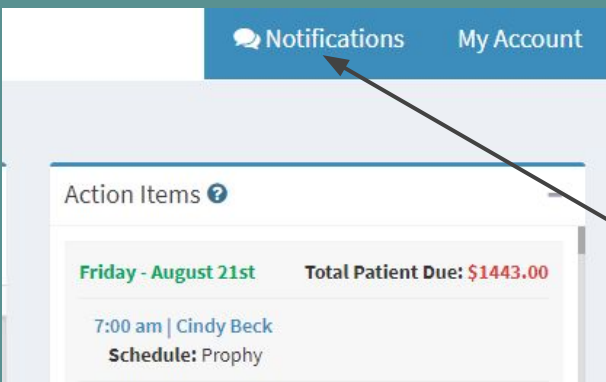
- ❖ Quick responses - easy, generic responses that we use often
- ❖ Image below is what the text thread will look like for a specific pt
- ❖ You will see the automated texts and texts sent from specific people

Texting Patients

The screenshot shows a text message conversation on a mobile device. At the top, a blue bubble from "Stubbs Dental - Bountiful" says: "Aaron, you are now receiving texts from Stubbs Dental - Bountiful. To unsubscribe reply 'STOP'". Below this, another blue bubble from "Stubbs Dental - Bountiful" says: "Aaron, Save the date for your appointments with Stubbs Dental on Fri, Aug 21st, 2020 at 11:30 AM. Add it to your calendar: <https://appt.mx/d3XZR> <https://appt.mx/LOWf9>". Then, a gray bubble from "Aaron Seiter" (with a profile picture) says: "Insurance co: delta dental Member ID: 119260984601 SAP Group Name &#: Delta Dental PPO 18929-06100 Employer: Qualtrics (Rebecca and Aaron both work there) DOB: 06/18/1985 (rebecca) 02/20/1986 (Aaron) Primary subscriber name: Rebecca Seiter". Finally, a blue bubble from "Hannah Howell" says: "Thank you for the information. We look forward to seeing you at your upcoming appointment!". The conversation is timestamped with "Aug 22, 5:05 PM - Delivered" for the dental office messages and "Aug 21, 10:57 AM" for Aaron's message. At the bottom, there is a "Type Message..." input field and a "Send" button.

Texting Patients

- ❖ We receive email notifications when we have an unread text message. To view our text message threads: click the “Notifications” link in the upper right hand corner.
- ❖ All text message threads will show. Unread messages will be highlighted



Pre-Op Surgery Instructions

Pre-operative measures for patients receiving sedation or general anesthesia.

Are you on any blood thinning medications?

1. Because aesthetic medication causes prolonged drowsiness, you must be accompanied by a responsible adult who will drive you home and stay with you until you are sufficiently recovered. This may be up to 24 hours after your surgery.
2. You should not drive, operate heavy or complicated machinery, sign any documents, or make any important decisions within the first 24 hours after surgery.
3. Bring all medications that you take with you. If you use an inhaler for asthma or a glucometer for diabetes, please bring them with you.
4. Your mouth and teeth should be well cleaned before your appointment. While brushing and rinsing, try not to swallow any of the water.
5. Wear a loose t-shirt and comfortable clothing, something that will allow us to run an IV. Do not wear jewelry or contact lenses. You may bring glasses.
6. Remove any dark fingernail polish.
7. If you have a change in health either before or after surgery, please contact our office.

Morning Surgery

- Eat a light dinner the night before your surgery.
- Nothing to eat or drink after midnight. (NO GUM, NO FOOD, NO WATER)
- No alcohol or aspirin is permitted.

Afternoon Surgery

- No milk products or solid foods after midnight.
- Clear liquids only before 6:00 AM (tea, coffee, broth, plain jello, apple juice)
- Nothing to drink after 6:00 AM. (NO GUM, NO FOOD, NO WATER)
- No alcohol or aspirin is permitted.

Exceptions

- It is important that you take any regular medications (such as medications for high blood pressure, or antibiotics) or any medications you have been prescribed by this office using only a small sip of water.

ALL WOMEN - We will need to administer a urine test. (LEGAL REQUIREMENT)

All on 4 Appointment Process

1st Appointment

Impressions and medical history
Case goes to lab for 1 week

2nd Appointment

Wax Rim
Obtain dimensions of the mouth
Case goes to lab for 1 week

3rd Appointment

Look See (May be more than one appointment)
Approving the look of the teeth
Case goes to the lab for 2 weeks

4th Appointment

Surgery
Surgery is an all-day process and can take 10 or more hours

5th Appointment

Post-Op - Day after surgery

6th Appointment

Post-Op - 6-8 weeks after surgery
Checking gum tissue & healing to see if you
may start using a waterpik

7th Appointment

Post-Op - 6 months after surgery
Checking healing to see if you are ready to start
finals

8th Appointment

Start Final - 6 months after surgery
Remove temporary denture in the morning and
return it in the afternoon.

**Please be aware that you will be without
teeth all day.**

Case goes to the lab for 1 week.

9th Appointment

Wax Try-in (may be more than one
appointment)

Case goes to the lab for 2 weeks
10th Appointment

Seat Finals

Recommended 6-month cleaning (optional)
Recommended Night Guard (optional)

Our doctors have a combined 60 years of experience in the dental field.
Our hygienists have a combined 20 years of experience in the dental field.

We are proud to be associated with:

The American Dental Association
The Academy of LDS Dentists
The Utah Dental Association

Our Business Accomplishments

2017 National Consumer Advisory Board
Small Business Excellence Award - Cosmetic Dentists

2018 National Consumer Advisory Board
Small Business Excellence Award - Cosmetic Dentists

2019 National Consumer Advisory Board
Small Business Excellence Award - Implant & Sedation Dentists

2019 Small Business of the Year - Davis County Chamber of Commerce

Dr. David Stubbs

2017 America's Best Dentists - Cosmetic Dentists
2020 America's Best Dentists - Cosmetic, Implant, and Family Dentistry
2020 - 2021 The Marquis Who's Who Publications Board - Who's Who in America

"Inclusion is limited to individuals who possess professional integrity, demonstrate outstanding achievement in their respective fields and have made innumerable contributions to society as a whole. "

Dr. James Willardsen

2018 America's Best Dentists - Cosmetic, Implant, and Family Dentistry
2019 America's Best Dentists - Cosmetic, Implant, and Family Dentistry
2020 America's Best Dentists - Cosmetic, Implant, and Family Dentistry

Dr. Joseph K Kuchenmeister

2019 America's Best Dentists - Cosmetic, Implant, and Family Dentistry
2020 America's Best Dentists - Cosmetic, Implant, and Family Dentistry

Dr. Shane Phillips

2019 America's Best Dentists - Cosmetic, Implant, and Family Dentistry
2020 America's Best Dentists - Cosmetic, Implant, and Family Dentistry

Scheduling Institute Tips

- ❖ All answers should be brief, inviting, and worded in a way that does not lead to more questions.
- ❖ Avoid the word “Can.” Use “May” instead.
- ❖ Avoid answering the patient’s questions with a yes or no. Say “absolutely” or “actually” instead.
- ❖ Do not use clinical verbiage. This can confuse or overwhelm the patient and invite more questions.
- ❖ Take control by saying “when you come in.”
- ❖ Avoid all money talk and revert back to the complimentary consultation verbiage.
- ❖ Never put a new patient on hold.
- ❖ Never leave the answers open ended by asking “What time would work best for you?”
- ❖ Never say “I have” or “we have” when offering appointment times.
- ❖ After tiering down with the dual alternative close, say “Would an appointment on ____ at ____ work for you?”
- ❖ Avoid long pauses and dead air.
- ❖ If they don't ask, we dont tell. Especially with insurance.
- ❖ We are selling appointments, not treatments.

Greeting

“Stubbs Dental, This is _____. How May I help you?”

Listen and Answer Questions

Identify what the caller needs within the first 5 seconds.

After answering their question, use a transition phrase or question or your own and immediately transition into scheduling. This puts you in control of the call and helps to avoid lengthy or unnecessary conversations.

Transition

Take control of the call by asking a question of your own.

“When was the last time you were seen in our office?”

“Let me be the first to welcome you! And I always love to ask, how did you hear about our office?”

“Would you like to make an appointment for a cleaning or do you have a concern?”

Dual Alternative Close

Two options make the caller feel like they are in control.

“Would you prefer the Bountiful or Layton Office?”

“Would you prefer mornings or afternoons?”

“Would you prefer Monday at 10 or Tuesday at 9?”

“Would you prefer _____, or would you like for me to check a different day?”

Confirm and Commit

Dr. _____ and our team have reserved DATE and TIME for you. I look forward to seeing you.

Should an emergency arise, will you call me? My name is _____, and try to let me know at least 48 hours in advance?

-- pause and wait until the patient responds with yes --

Data Capture

When someone doesn't want to make an appointment right now:
add their information to the Follow up Sheet / Data Capture file in Google Drive.

“I hope to hear from you soon, but in case I don't hear from you, would it be okay if I got your full name and contact number so that I can follow up with you?”

What is an AO4? What is the same-day-smile?

"The All-on-4 procedure is a revolutionary smile makeover. It's a great option for patients looking for a permanent option for missing teeth. The All-on-4 is a permanent denture that doesn't slide around, and doesn't have a plate against the palate like a traditional denture. So it feels very comfortable and natural. On the day of your surgery, a surgeon will place 4 implants and attach a permanent denture, so it truly is a same-day-smile."

How much does the AO4 cost?

A1: "Actually, costs can vary greatly from patient to patient. When you come in for your free consultation, our doctor will develop a treatment plan customized for you and then our financial advisor will go over the quote and discuss the different payment and financing options."

A2: "Actually, we have a promotion going on right now for \$10,000 off of our original pricing. Again, I would hate to misquote you and you'd need to be seen in our office for an exact estimate, but with this discount you can expect to start out at around 15,000 per arch."

How much does _____ cost?

A1: "Actually, costs can vary greatly from patient to patient. When you come in for your free consultation, our doctor will develop a treatment plan customized for you and then our financial advisor will go over the quote and discuss the different payment and financing options."

A2: "Again, I would hate to misquote you. You'd need to be seen in our office for an exact estimate, but with this procedure you can expect a starting price of _____."

Do you accept insurance?

"Absolutely! We accept most insurance plans. When you come in for your free consultation, we will provide a complimentary benefits check to make sure you are receiving all the benefits that you qualify for."

Do you accept my insurance?

A1: "We do work with most insurance plans, I think we do accept _____, I know we have a few patients that use that insurance. When you come in for your consultation they will contact your insurance company for you and ensure that you receive all the benefits you qualify for."

A2: "I would hate to misquote your insurance benefits. Many patients find it helpful to call the customer care number listed on the back of their insurance card. We will do a complimentary benefits check when you come into the office for your free consultation."

We work with all PPO plans. We do not work with Medicaid, Medicare or HMO plans.

We do work with some Medicare plans, as long as it is a PPO plan.

Do you accept Medicaid?

"We accept all patients, however, we are considered out of network with Medicaid. We do have many Medicaid patients in our office, but they have chosen one of our 3rd party financing or payment options."

Do you guys offer _____? Do you guys do _____?

If yes: "Absolutely. Our doctors are familiar with _____ and our patients have seen great results! Let's get you set up for a consultation with the Dr/Hyg to see if you are a good candidate."

If No: "Actually, our patients have seen even better results with a different option. Let's get you set up for a consultation with the Dr/Hyg to see if you are a good candidate."

FAQ - Frequently Asked Questions - Page 2

Do you see kids? Do you see patients with disabilities? Do you see patients with special needs?

"Absolutely! Our doctors have plenty of experience working with _____. Let's bring you in for a complimentary consultation so you can meet the doctor and decide if we are a good fit for your needs."

What are your hours? Are you open on Saturdays? Are you open after 5?

Monday - Thursday 9-5 and Friday 8-3

"We offer a variety of appointment times from 8am-5pm, Monday through Friday"

"We understand our patients have busy schedules. Sometimes our patients find that an early morning or lunch-time appointment may work better."

Can you schedule my appointment on _____? Can I be seen tomorrow?

If No: "Actually, our doctors are fully committed to their other patients at that time. Let's keep looking for another time that may work for you." "Yes, our doctors are in very high demand because they provide such amazing care."

"Let's get you scheduled for this soonest available slot, and I will add you to our ASAP list. This means that if there are any scheduling changes that allow us to see you sooner, we will give you a call and see if you'd like to move into that time slot."

This is an "emergency," can I be seen today?

"Our Dr.s are fully committed today. However, since you said that this is an emergency, you can head down to the office now and we will make sure you are seen sometime today."

(most patients are not facing a true emergency, and will choose not to wait in-office, but get on the books for an appointment instead.)

How do I get to the office?

Layton: Get off on the Antelope Drive exit and head east. We are located behind Target and next to Chick-fil-A.

Bountiful: Get off on the 2600 exit and head east. Turn right onto 500 West, then right onto Orchard Drive.

Can you send my xrays?

Have they had any work done here before, or just a consultation?

YES: "Absolutely. Let me get an email address and I will have the front office send them over."

NO: "I'd be happy to send those x-rays for you, however, it looks like you were only seen in our office for a free consultation. As such, there is a fee of _____ to send those xrays."

BITEWINGS and NORMAL X-RAYS: **\$125** - PANO -XRAY: **\$200** -
BOTH TYPES OF X-RAYS: **\$325**

Do you offer a discount if I pay in cash?

"Absolutely! Our patients that can pay with cash or check may receive an additional 5% discount."

Is this Clear Choice? Is this Dream Dental? (our competitors, our number pops up when you search for them)

"You probably found our number while looking for providers for the All-on-4, same-day-smile procedure. We were just named as the number one provider in Utah for this procedure, and we've completed over 850 arches."

Can you remove me from the mailing list? (send info to marketing, it can take 4-6 weeks to be effective)

"Of course. Let me get some information from you, and I can have you removed from the mailing list."

•What is the full name it is addressed to? •What address was it sent to? • What ad is being sent?

Insurance companies we work with			Procedure			We do NOT work with		
Procedure			Procedure			Procedure		
Delta Dental - we are in network for most plans but not all						Medicaid		
Adult Prophy w/ cleaning			Root Canal			Upper/lower w/sedation		
Select Health						Molina		
Blue Cross, Blue Shield						HMO Plans		
Child Prophy w/ cleaning			Extraction			IV Sedation		
EMI								
Humana								
Propho Maint			Surgical Extraction			Orthotic occlusal device		
Met Life								
United Healthcare								
Dental Select			Flipper			Night guard		
United Concordia								
GeHA								
AO4 cleaning			Implant			Clear Correct		
Some Medicare - <u>only if it is a PPO plan</u>								
Fluoride			Partial Denture			In office bleaching		
Peridex Mouthwash			Full Denture			Whitening trays		
Limited			Snap on Denture 2 implant, 1 arch			Whitening Gel (per syringe)		
Fillings			Snap on Denture 4 implant, 1 arch			Whitening strips (Sheer) 10 (5 days worth)		
Crowns			AO4 1 Arch					

----- Reaching out via email from Simplifeye

Hello (PATIENT NAME),

I received your information from our online chat agent, and I saw that you were interested in coming in for a complimentary consultation at our office. We'd love to see you! We tried reaching out to the phone number provided, but we were unable to reach you at the time. Please feel free to reply to this email or call our office to schedule an appointment.

We look forward to hearing from you soon.

Regards,

----- Confirm Appointment on TXT

Looking forward to seeing you for your appointment on **(DAY OF THE WEEK, MONTH, DATE) at (TIME)**.

Looking forward to seeing you for your appointment on **(DAY OF THE WEEK, MONTH, DATE) at (TIME)**. Please call our office to confirm and go over our COVID-19 pre-screening questions.

----- Reschedule Appointment via TXT

Hello! We are reaching out in regards to your appointment on **(DATE)**. Our doctor is unavailable on this day at this time. Please call so we can help you reschedule this appointment. 801-939-5900

----- Reschedule Appointment via Email

Hello (PATIENT NAME),

We have been trying to get in touch with you in regards to your appointment on **(DATE)**. Our doctor is unfortunately unavailable on this day at this time.

Please call so we can help you reschedule this appointment, and provide us with any updated contact information you may have. Our phone number is 801-939-5900.

Regards,

----- Voicemail reaching out for unscheduled HYG list, NEW PATIENT

Hello, this message is for **(PATIENT NAME)**. This is **(YOUR NAME)** with Stubbs Dental. I was reaching out to you today because I noticed that you had a cleaning appointment scheduled with us back in **(MONTH OF YEAR)** and I'd like to invite you to come into our office to meet our hygienist and get that cleaning done. If you'd like to get in touch with me so that we can find a time that works for you, my number here is 801-939-5900. Thanks so much and I look forward to hearing from you soon.

----- Voicemail reaching out for unscheduled HYG list, RETURNING PATIENT

Hello, this message is for **(PATIENT NAME)**. This is **(YOUR NAME)** giving you a call with Stubbs Dental. I was just taking a look over your chart here and I noticed that you were due for a cleaning and I wanted to invite you to come back into the office to get that done because we'd love to see you again. If you'd like to get in touch with me so that we can find a time that works for you, my number here is 801-939-5900 Thanks so much and I look forward to hearing from you soon.

----- Voicemail reaching out for LUCID EMAILS AND SIMPLIFEYE

Hello (PATIENT NAME), This is (YOUR NAME) calling from Stubbs Dental. We're calling you today in regards to the email you sent us. We wanted to follow up with you to make sure all of your dental needs were taken care of, and invite you to our office for a complimentary consultation. If you can please give us a call back so we can find a time that works for you, our number is 801-939-5900, thank you so much and have a good day.

----- Voicemail reaching out for AO4 Reschedule / Cancel list

Hello, this message is for **(PATIENT NAME)**. This is **(YOUR NAME)** calling from Stubbs Dental. We were reaching out to you today because we noticed that you had an appointment previously scheduled for a complimentary consultation. We were just following up to see if you'd be interested in rescheduling at this time. If you would please give us a call back, we would be happy to schedule a date and time that works best for you. Our phone number is 801-939-5900. Thanks so much and we look forward to hearing from you soon.

----- Voicemail reaching out for UNSCHEDULED TX PLAN (1st appt after consult)

Hello, this message is for **(PATIENT NAME)**. This is **(YOUR NAME)** with Stubbs Dental. I was reaching out to you today because when you came into our office you met with the doctor we discussed a treatment plan with you that included **(STUFF)** and I was just reaching out to you today to see if you wanted to get started with that treatment and get an appointment scheduled. If you'd like to get in touch with me so we can find a time that works for you, our number here is 801-939-5900

----- Voicemail reaching out for UNSCHEDULED TX PLAN (next step in tx plan)

Hello, this message is for **(PATIENT NAME)**. This is **(YOUR NAME)** with Stubbs Dental. I was reaching out to you today to see if you'd like to continue with the next step in your treatment plan. I'm showing that there was some additional work to be done **(or mention next step of treatment)** and I was just following up to see if we can make that appointment for you. If you'd like to get in touch with me so we can find a time that works for you and your schedule, our number here is 801-939-5900. Thanks so much and I look forward to hearing from you soon.

----- Voicemail reaching out from Data Capture List (New pts that didn't schedule)

Hello, this message is for **(PATIENT NAME)**. This is **(YOUR NAME)** with Stubbs Dental. I was reaching out to you today because I know we spoke a little while ago about **(STUFF)** and I wanted to follow up with you and make sure you got taken care of. We'd still love to bring you into the office for a free consultation, so if you are still interested in setting up an appointment for that, you can reach out to me here. My phone number here is 801-939-5900. Thanks so much and I look forward to hearing from you soon.

TIME OFF REQUEST

EXAMPLE

Date: 01/01/2020

Employee: Sammy Joe

Date of Requested Time Off: 02/02/2020

Person Covering for you: Kate, Lee, and Brit

How will this time be taken:

PTO ☐ Unpaid ☐ <<<< Answer to what you want

This request for time has been

Approved ☐ Not Approved ☐ <<<< Manager will answer this

Employee: Sammy Joe Office Manager: _____

Reason: Family party

How to : Upload Patient Before/After Photos to Image Center

- Download images from the email to your computer. Place them in a file you can easily find.
- In open dental:
 - Select correct patient
 - Click “Images” module on the left side of the screen
- Select whether you will be uploading pre op or post op photos in the folder section on the left side of the screen
 - Select “import” at the top of the screen
 - Your computers file explorer will open.
 - Navigate to where you downloaded the images to.
 - Select all images for the patient
- Uploading will begin and will be done one by one
 - Describe each photo being uploaded:
 - For Pre op descriptions
 - Records - these are photos typically taken at the impressions appointment
 - Records front smile
 - Records front no smile
 - Records side smile
 - Records oral
 - Records teeth up close
 - Etc

- Day of - day of surgery
 - Day of front smile
 - Day of side no smile
 - Day of teeth up close
 - Etc
- For Post op descriptions:
 - Day of - day of surgery
 - Day of front smile
 - Day of side no smile
 - Day of teeth up close
 - Etc
 - Day After
 - 6 weeks, 12 weeks, etc
 - If you do not know the time of post op you can put “Temps”
 - Temps front smile
 - Temps side no smile
 - Etc
 - Finals
 - Finals front smile

Random info

❖ AO4 info

- Our pricing is approx. 30-50% less than other companies
- Three (3) AO4 cleanings are recommended every year, at least 2
- When scheduling AO4 cleanings, ask if everything is fitting okay. If the pt is having any issues schedule with the Dr first
- 3 on 6 - we do not offer at our office, if the patient is interested in that procedure let them know these reasons the AO4 is better: 3 on 6 has no titanium bar (bar gives our prosthetic more longevity), 3 on 6 prosthetic has no gums, implants are not at an angle (the angle makes them stronger)

❖ Levels of sedation

- Laughing gas
- Sedation medication
- IV Sedation (the pt is awake but extremely relaxed)
- General Anesthesia (the pt is completely knocked out)

❖ 3rd party payment options

- Care Credit, Green Sky, On Spot (which is through Mountain America), Proceed Finance

❖ Dissolvable Sutures vs Non-Dissolvable

- Vicryl and Gut dissolve, PPFE do not. Vicryl is most commonly used here



Murray Location Patients- Follow up sheet

- *When you have a patient wanting to be seen in Murray with it not being open. Information to get*
 - *Name First & Last*
 - *Number*
 - *Reason for calling*

How to run and print referral letters

Each weekly run a new patient referral report to send a \$20 gift card thank you letter.

In Open Dental:

- It does not matter which clinic you select, the report includes all clinics
- Select “Reports” at the top on page in the menu
 - User query
 - New patient referred by existing patients
 - Change the date to the prior week.
 - Select “OK” to run report
 - Print report
- Make sure to look out for any patients referred by an employee. Employees do not receive a gift card.
- Go through each new patient to ensure the correct primary provider is selected and that they actually showed up for their appointment. Free consultations are counted.
 - You can either see this information in the chart view, or “view appointments” in the appointment module.
- Note which location each new patient is from.

When ready to print letters:

- Select patient - any view will work
- At the top of the page in the menu select the downward facing arrow next to “Letter”
- Under Referrals
 - Select “From PATIENT NAME”
 - Print letter

How to: New Patient Letters

Each week send new patient welcome letters to new patients in all clinics.

- Select clinic
- In appointment module view, select starting date
- Click once on each appointment marked with NP
 - Select “Letter” in top menu
 - Select “Patient Letter - NP Welcome”
 - Print

Repeat for each clinic

How to : Patient Inquiry Emails

Responding to patient inquiry emails that come in the Bountiful general inbox (stubbsdentalutah@gmail.com) from patient through our website “contact us” form.

- Check consistently throughout the day for new patient inquiry emails.
- Respond ASAP using provided templates.
- Ensure to personal the template with possible.
- Ensure all patient questions are answered if the template does not address their question.
- 24 hour no response
 - Forward to scheduling@stubbsdental.com for first call.
- Day after completed first call with no answer
 - Send “after first call” email template
- 7 days after email/call with no response
 - send to scheduling@stubbsdental.com for second call
- Day after second call with no response

How to: Reply to Patient Google Reviews

Check Google My Business at least once a week for new reviews and post a reply.

- Log into stubbsdentalutah@gmail.com
- Click “Google Apps” this is the dotted box icon next to our Stubbs Dental logo in the top right corner
 - Scroll to
 - find “My Business”
 - Select location
 - On the left of the screen select “reviews”
 - Reply to reviews without a public reply.
 - Use their name, give an individual response and try to mimic what they have said.
 - See previous reviews for examples.
 - If they leave less than a four star review, send the review to location directors and doctors to have them personally reach out.
 - Contact marketing@stubbsdental.com for public response.
- Be professional and ensure there are no typos.

How to call patients from unscheduled appointment list

- Select clinic location
- Open appointment module view (the full schedule will show)
- In the upper right hand of the screen, above the monthly calendar, select the clipboard icon (next to the printer icon)
 - Select unscheduled
- Double click the appointment to see patient phone number, apt notes, apt length, and provider.
- Leave apt note & comlog notes if you reached patient and they
 - Did reschedule
 - Didn't reschedule
 - If you left a voicemail to reschedule their appointment
 - Etc
 - This way if they call back any who answers the phone will be able to reschedule their appointment for them.

Tips:

- Keep patient with the correct provider.
- If the patient has gone elsewhere for treatment or says they do not want to continue treatment you can delete the appointment BUT make sure to put a comlog note in about what appointment you deleted and the reason why.