GENERAL DENTIST

Dental Receptionist Manual

Note: The following policies and procedures comprise general information and guidelines only. The purpose of these policies is to assist you in performing your job. The policies and procedures may or may not conform with Federal, State and Local laws, rules and regulations and are not offered here as a substitute for proper legal, accounting or other professional advice for specific situations.

Prior to implementing any of these suggestions, policies or procedures, you should seek professional counsel with your attorney, accountant and/or the appropriate governing or licensing board or any other applicable government body for a full understanding of all appropriate laws, rules, procedures or practices pertaining to your healthcare discipline or business activities.

TRAINING MANUAL INFORMATION

READ FIRST

The purpose for this General Policy Manual is to help you understand and use the basic policies needed to be an effective part of our dental team.

Our reasons for giving you this training manual are threefold:

1. **To provide written policies and procedures relating to your job functions.**
2. **To ensure you have a resource for correcting or adding to the written exam questions (since we only accept 100%)**
3. **To provide you with a future reference. We do not expect you to memorize all of the policies relating to your job. But, we do expect you to refer back to the appropriate written material and review it on your own as well as with your supervisor.**

When you have finished reading the policies in this manual, please see your supervisor for the written exam. When you have finished the exam, you will refer back to the appropriate policy in an open book style to change or add to your answers until your supervisor is satisfied every question and each "active procedure" has been successfully executed without error.

Ultimately, we expect that your complete review of this manual will help you understand and use the general policies and communication vehicles of our office.

HOW TO EDIT YOUR MANUALS

PRACTICE MANAGEMENT SOFTWARE (PMS) NOTE

This manual uses Dentrix as the reference Practice Management Software (PMS) for all software-based instructions due to its widespread use in dentistry.

If your practice uses a different PMS (e.g., Eaglesoft, Open Dental, Curve, SoftDent,

Dentrix Ascend), the software-specific instructions may be updated at no charge for any commonly used system without altering the policies, protocols, or intent of this manual. As you might imagine, creating these manuals was quite an undertaking. We knew that no single manual would apply to every practice, since each doctor has a unique personality and management style. Over the years, we updated the manuals with both ideas from our clients and emerging techniques.

The resulting contents provide detailed policies and procedures that will significantly reduce your administrative efforts. You may choose to leave the contents in the original form or to adapt the contents to meet your specific style.

Once you have reviewed the manuals and personalized the contents, you will have a solution for competently dealing with the majority of employee-related concerns in your dental office. You'll also have written documentation to consistently support each situation, which will alleviate you from continually rendering opinions.

We recommend you (or your designee) print the manuals and place them in a notebook binder. Then, review each policy and make edits as needed. For example, you may want the phone answered differently than the wording in our script or you may not want to include "Paid Holidays." In these instances, simply draw a line through the corresponding contents (use red or blue ink so it's easy to see) and then draw an arrow to the new text that you want included. If there is a policy that does not apply to your practice, simply draw an X through the whole policy and write "delete" in bold letters across the appropriate section.

When the editing is complete, input the changes into the original Microsoft Word file and save. You can then print as many copies as you need and make changes in the future as necessary.

In addition to the detailed information in our manuals, we suggest you retain other relevant handbooks and references that are essential to managing your practice (e.g., equipment manuals, software guides, etc.) All manuals and guides should be stored together in an easily accessible area of your office for quick reference.

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JOB RESPONSIBILITY

The responsibility of the Receptionist is to professionally greet all patients whether on the phone or in person, ensure all forms are properly filled out, and direct patients to the treatment area as quickly as possible.

In addition, the Receptionist must effectively receive and route all communications to the staff and dentists.

SETTING THE ANSWERING MACHINE

Before leaving each evening, it is the Receptionist's responsibility to turn on the answering machines using the steps below:

1. Activate the machine for the doctor who is on call for that evening or weekend.
2. Press the on/off button to turn the answering machine on.

RETREIVING MESSAGES

As one of the first duties each morning, the Receptionist is to turn off the answering service and retrieve the messages using the steps below:

1. Press play for the machine that was on.
2. Each message will play individually. There is a pause between messages.
3. After obtaining the caller's name, the nature of the call and return number, delete the message.

BACKUP AND LOG-IN TECH

The Receptionist is responsible for changing the backup tape each day. The server is located in Dr. [name]'s office. Dr. [name] is in charge of the computer. When Dr. [name] arrives in the morning, he will log on to verify there were no errors. If no errors have occurred, the Receptionist will need to change the tape using the following steps:

1. **Press the eject button next to the tape insert area.**
2. **Insert a new tape labeled for that day of the week.**

All tapes are labeled Monday through Friday. These tapes are kept in the black bag.

Any questions regarding hardware or the network are to be directed to Dr. [name]. Any software questions are to be directed to the dealer of that particular software – ______ Support = memory #111.

COMMUNICATION

The telephone may never ring more than three times before being answered. If you are on another line or otherwise engaged the Accounts Manager or Treatment Coordinator will help answer the phone. There are telephones throughout the office, so if you are somewhere other than the front desk when the phone rings, you may answer it on any of these phones and place the caller on hold until you return to the front desk.

Before transferring a call to the appropriate person, obtain the caller's name, reason for calling and their phone numbers (home/work/mobile). If the call is from an active patient, pull the patient's chart before transferring the call. If the caller is a new patient, fill out the "New Patient Call-In Form" using the appropriate dialogue. Since we have another employee designated as the Scheduling Coordinator whose main responsibility is ensuring our appointment book is effectively scheduled, transfer all new patient calls to her unless she is on the phone with a patient. In that situation, transfer the new patient call to the Treatment Coordinator or Accounts Manager. If you are on the phone taking new patient information, you won't be able to efficiently deal with other calls and patients coming in to the practice.

The Receptionist is the coordinator between the front and back office; and, therefore must be exact when relaying information. The best method for relaying messages is in writing.

Always be aware of the schedule. Know which patients will be arriving next, who is in the waiting room, who is in the back, how long they have been in the office, etc. Walk through the office occasionally to briefly talk to patients who are waiting to maintain good communication and ensure everything is going well. If you spot a problem, handle it yourself or request assistance from someone who can deal with it immediately.

This high awareness of the schedule and office activities is essential to our ability to deliver high quality dental care, swiftly and efficiently.

NEW PATIENT CALL-IN DIALOGUE

You will be the first contact new patients have with our office. Your voice is the first one they will hear. The way you handle yourself over the phone, as well as at the front desk, is key to getting and keeping new patients.

The following is a general script for a new patient call:

REC:

"Good morning. Dr. [name]'s Family Dentistry. This is

_______________. May I help you?"

Patient:

"I'd like to make an appointment to see the doctor."

REC:

"Great! What is your name, please?"

Patient:

"John Smith"

REC:

"Thank you. Mr. Smith, when was the last time you were in to see the doctor?" (This isolates new patient from former patient without offending.)

Patient:

"Never."

As soon as you determine the patient is a new, get a New Patient Call-In Form and fill out the top portion.

REC:

"May I please have your home, work or mobile phone number?"

Patient:

"Home is 332-8031. Work is 324-3246. Mobile is 324-4424."

REC:

“Thank You. Which of these numbers would you like us to use as your primary contact?

Patient:

“Mobile.”

REC:

"Great! How did you hear about our office?"

If he/she was referred by another patient, say something nice about the referring patient ("Betty referred you? She's an awesome person, I think you’re the third person she’s referred this month!"). Make sure whatever remark you make is sincere and not phony.

REC:

"When was the last time you saw a dentist?"

(Let patient respond.)

REC:

"Are you having any problems with your teeth now?"
(Let patient respond.)

REC:

"Do you have dental insurance?"

If no, explain our prices for the initial visit. Then pass the patient to the Scheduling Coordinator.

If yes, then tell the patient how we handle the insurance in our office, fill out the insurance section of the New Patient Call-In Form, and pass the call to the Scheduling Coordinator to schedule the appointment.

NEW PATIENT CALL-IN FORM

DATE CALLED

APPT. DATE & TIME

PATIENT NAME

IF PATIENT IS A CHILD, PARENT'S NAME

HOME PHONE

WORK PHONE

HOW DID YOU HEAR ABOUT OUR OFFICE?

WHEN WAS THE LAST TIME YOU SAW A DENTIST?

ARE YOU HAVING ANY PROBLEMS WITH YOUR TEETH NOW?

DO YOU HAVE DENTAL INSURANCE?

If yes, get the following information:

Name of the insured person

Relationship to NP

Employer of the insured

Emp. Phone #

SS# of the insured person

SS# of the patient

Name of Insurance Co.

Ins. Co. Phone #

ACCOUNTS MANAGER: Verifies benefits and fills out before NP arrives.

Name of Insurance Company Rep.

Effective Date:

Max. benefits/year

Deductible Amount

Has ded. been met?

Does deductible apply toward preventative?

Percentage covered after deductible for-

Preventative

Basic

Major

Endodontics

Periodontics

Frequency of Cleanings: (check one)

Two cleanings/year

__Once every six months

Two cleanings within 12 consecutive months

Date of last cleaning

Date of last Full Mouth X-Ray

Do you replace teeth missing prior to effective date of coverage?

Benefits left for the year?

Other comments:

PATIENT FLOW

Checking the flow of patients through our office is a constant job for the Receptionist. From the time a patient walks through the front door until he/she walks out, you should know where the patient is located. This duty can sometimes be a challenge, because you are checking patients in, answering phones, etc. However, this is your #1 priority. Patients do not like waiting in a dental office and maintaining proper flow through the office will ensure that the schedule is followed as closely as possible.

Clear, concise communication between the doctor, Hygienist, assistants, and administrative personnel is vital in maintaining smooth, efficient flow through our office.

ANSWERING INCOMING CALLS

The phone may lead you in a number of different directions. Business calls should be forwarded to the appropriate staff member (questions regarding insurance, accounts, collections would go to the Accounts Manager, etc.)

When a patient calls the office and is in pain, you will need to fill out an Emergency Call-In Sheet. Complete the form by filling in the answers as you go. Following are some of the questions you will be asking:

1. “When was the last time you saw Dr. [name]?” This response will tell you if you are dealing with a new patient, an old patient who has been inactive, or an active patient. If the patient already has a chart, pull it from the files. Also, be sure to check the patient's account.
2. “How long have you been in pain?”
3. “What type of pain are you experiencing (have the patient describe the pain)?” If it is a dull ache, the patient can usually wait until we can fit him/her into the schedule. If the pain is sharp, excruciating, throbbing, etc., the patient should be worked into the schedule ASAP (the same day). True emergency patients will come at any time you give them. Patients wanting quick appointments of convenience will usually give you the "run around" regarding what time they can make it into the office.

If an active patient calls the office for a prescription, follow the policy "CALLING IN PRESCRIPTIONS."

Employees receiving incoming personal calls should not be interrupted unless it is a true emergency. All messages will be documented on a “phone message” form and placed in the employee’s mailbox. The employee may then return the call during lunch or a break.

The following calls may be put through to the doctor if he is not in the middle of a procedure; other doctors, emergency calls from family, and labs (in some cases). Take a message for non-emergency personal calls, patients who do not have an emergency or aren't upset, sales people and other business personnel.

ROLE PLAYING AND PROCEDURE DRILLS

Information: The following procedures are to be repeated as many times as necessary until you can complete each one correctly and with confidence. This is not a test. The purpose of role-playing and going over these procedures is to help you develop accuracy and professionalism in your skills. The only way to develop a high level of skill is with practice and more practice. Therefore, all of the procedures need to be approved by a qualified employee, Office Manager or Dentist by signing their name on the line under the applicable role-play or procedure drill.

1. Memorize the first paragraph in the policy titled “Job Responsibility”. Have a qualified employee confirm you know it word for word.
   Signed:
2.
3.
4.
2. Even though you will be passing new patient calls to the Scheduling Coordinator, it is important for you to be trained on some of the other front desk duties whether it is in your job description or not. Role-play with a qualified employee, scheduling a new patient using the New Patient Call-In form. Repeat as necessary until you can do so with confidence. Signed:
3.

4.
5.
3. Role-play with a qualified employee, the appropriate questions to ask a “patient in pain” according to our procedure “Answering Incoming Calls.” Repeat as necessary until you can do so with confidence.
   Signed:
4.
5.
6.

CALLING IN PRESCRIPTIONS

Sometimes a patient will call in for a prescription.

After it is determined that the person calling is an established patient who may need a prescription, fill out a "Prescription Needed” Form (see the following page for a sample). Fill in the patient's name, last treatment rendered, known allergies, type of pain, how long in pain, and any other pertinent patient complaints. Then, get the name and phone number of the drugstore he/she uses. If he/she doesn't know the phone number, then get the location and/or street name.

Next, pull the patient's chart and take it and the Prescription Needed Form to the doctor. Let the doctor read the form. Either hand it to him or hold it for him to read, depending on what he is doing at the time. The doctor can then either write down the prescription himself or dictate it to you.

Call the pharmacy with the prescription. Be sure to have the doctor's DEA number on hand in case it is needed.

Be sure to document the prescription given (type of drug, how much dispensed, how to take it, refills, etc.) on the Treatment Rendered sheet in the patient's chart. Also indicate the drug store and phone number.

When complete, call the patient to let him/her know the prescription has been called in. Tell the patient to call us if they have not seen an improvement in two days or if they have any problems taking the medication.

If someone who has never been to our office calls for a prescription, that person must come in for an exam before we can prescribe anything. We will never prescribe medication to someone we know nothing about and who has never been in our office.

PRESCRIPTION NEEDED FORM

PATIENT NAME________________________________ DATE _________________

KNOWN ALLERGIES____

LAST TREATMENT RENDERED____

TYPE OF
PAIN____

HOW LONG IN PAIN____

OTHER PATIENT
COMPLAINTS____
____
____
____

PHARMACY NAME AND
PHONE#____

PRESCRIPTION____
____
____
____
____
____
____

DOCTOR'S DEA
#____

HANDLING PRICE SHOPPERS

You are the first contact new patients have with our office. If mishandled, this contact could be their last. It could also result in bad word of mouth by a person who has never even been to our office.

The importance of effective and professional handling of an initial phone call from a new patient cannot be over emphasized. You are the first impression, so ensure you give a good impression to everyone, especially new patients. All phone calls are important and must be handled professionally. However, the new patient call is especially important.

There can be pain connected with dentistry (e.g., the needle, drill, etc.) None of us can change that, but we can recognize this as one of the "main reasons" most people do not see the dentist regularly. Knowing this we can help people get into the office by understanding and empathizing, but not agreeing with the "so called" reasons they cannot make or keep their appointments.

Price shoppers will call and ask what we charge for fillings, extractions, cleanings, crowns, etc. It is a well surveyed fact that "price" is not the number one determining factor in why people will or will not have their dental work done. The number one reason people will choose to have their dentistry done is - friendliness of staff and doctor!

What we must overcome is most patients' "fear of dentistry." It is extremely important to make each patient feel as comfortable and welcome as possible. The following is one example of how to get the price shopper scheduled.

Rec:

"Good morning, Dr. [name]'s Family Dentistry, this is __________. May I help you?"

NP:

"How much do you charge for a cleaning?"

Rec:

"I'll be happy to explain our fees, but first could you give me your name?"

NP:

"George Smith."

Rec:

"Great! Now, when was the last time you were in to see the doctor George?"

NP:

"Never."

As soon as it is determined that the patient is a new one, get out a New Patient Call-In Form and fill out the top part.

Rec:

"May I please have your home phone number?"

NP:

"Home is 333-4444.

Rec:

"Great! How did you hear about our office George?"

If he was referred by another patient, say something nice about the referring patient ("Lucy referred you? She's an incredible person!") Make sure whatever remark you make is sincere and not phony.

Rec:

"When was the last time you were in to see a dentist?"

(Let patient respond.)

Rec:

"Are you having any problems with your teeth now?"

(Let patient respond.)

Empathize with the patient and compliment their concern for wanting to get it checked or treated. This is usually a good time to share one of your own experiences regarding a patient who had a problem similar to the caller and was taken care of by Dr. [name] or the Hygienist once they came in.

Rec:

"Okay! Our Hygienist does the best cleaning in town and I'm really glad you called! She has openings tomorrow or later in the week; which is better for you?"

NP:

"Late in the week, but how much does it cost?"

Rec:

"Our fee for your first cleaning is $55 plus the cost of x-rays and an exam. By the way, do you have dental insurance?"

Tell the patient how we handle the insurance in our office (if the patient has dental insurance) and fill out the insurance section of the New Patient Call-In Form. Then schedule the appointment, or transfer the call to the Scheduling Coordinator.

Rec:

"You said you'd like an appointment later in the week. Is morning or afternoon better?"

NP:

"Afternoon."

Rec:

"Great! I've got you scheduled for Friday at 2:30. OK?"

NP:

"Yes."

Rec:

"I'm looking forward to seeing you. When you come in, just ask for me. I'll make sure everything goes smoothly for you."

As soon as you get off the phone with a scheduled new patient, route the New Patient Call-In Form to the Accounts Manager, so the patient's insurance can be verified.

If a new patient insists on getting a fee for a filling, crown, etc., stress that we cannot make a diagnosis over the phone without first seeing the patient. All we can do is give an "educated guess" as to the cost of what is needed. Then give the low and the high possible fee if the patient is insistent. Always assure the prospective patient that we stand behind the quality of our work.

If the “price shopper” is very insistent about wanting to know how much you charge for extractions and does not respond positively to the above script, refer him/her to a clinic or dental school where he/she can get a “cheap extraction” if that is all they care about. If appropriate, explain to the price shopper that:

“Our dentist does high quality dentistry and does not believe in extracting teeth unless there is absolutely no alternative. If you really aren’t concerned about the future problems and expense that pulling your tooth will cause, I would recommend you come in for a complimentary consultation with the doctor, and then he can refer you to the appropriate clinic.”

EMERGENCY CALL-IN FORM

DATE CALLED

APPT. DATE

PATIENT NAME

ADULT

CHILD/AGE

HOME PHONE

WORK PHONE & EXT.

WHEN WAS THE LAST TIME YOU SAW Dr. [name]?

IF NEVER, WHEN WAS THE LAST TIME YOU SAW A DENTIST?

HOW DID YOU HEAR ABOUT OUR OFFICE?

WHAT TYPE OF PAIN ARE YOU EXPERIENCING?

WHICH TOOTH?

UR

LR

UL

LL

HOW LONG HAS IT BEEN HURTING?

ANY SWELLING?

MEDICATION?

IS THE TOOTH BROKEN?

LOST FILLING?

CHIPPED?

IS THE TOOTH SENSITIVE TO HOT OR COLD?

IS IT LOOSE?

IF A NEW PATIENT, DO YOU HAVE A CURRENT SET OF X-RAYS AVAILABLE FOR TRANSFER HERE?

NEW PATIENTS WHO REQUIRE PRE-MEDICATION

On the New Patient Call-In form, there is a section regarding a medical history. We ask every new patient these questions. They are very important.

We ask the patient if he/she has had a history of heart disease or heart murmur, joint replacement, rheumatic fever, or any other health problem. If the patient answers yes to any of the first four, he will need to be medicated before receiving treatment. Inform the patient of this procedure. Then, ask the patient if he/she is allergic to penicillin. Get the name and phone number of the pharmacy they use. Tell the patient you will call in the prescription within an hour and he/she can pick it up at his pharmacy anytime thereafter. Tell the patient that the directions for usage will be on the prescription. When getting this information, use the Prescription Needed form.

Then, go to the doctor with the New Patient and Prescription Needed forms. Inform the doctor that the patient will need to be pre-medicated, why, and whether or not the patient is allergic to penicillin. The doctor will then tell you what prescription to call in.

**The following page shows the prescription needed for someone allergic to penicillin. You can refer to this page when calling a pharmacy. You must always go to the doctor and ask him what to call in for any patient. Once the doctor gives you the name of the medication, you can refer to the following page for the correct dosage, etc.

SAMPLE PRESCRIPTION FOR A PATIENT WHO IS ALLERGIC TO PENICILLIN

Insert a sample of a prescription for a patient who is allergic to penicillin here.

HANDLING THE ESTABLISHED PATIENT

1. Greet the patient in a warm, friendly and professional manner.
2. Review the patient’s chart to see if you need to update patient registration and/or health history. Ask if he/she has any changes in address, phone numbers, health history, insurance, etc.

3. Inform the appropriate person (assistant or Hygienist) that the patient is ready to be seated via the computerized electronic communication system located in each operatory (you may need to seat the patient yourself if the clinical personnel are all busy).
4. If an active patient has new insurance, it needs to be verified. Get the patient's insurance card and make a copy. This copy is kept in the chart. Give the insurance information to the Accounts Manager to verify coverage.

HANDLING THE NEW PATIENT

1. Greet the patient in a warm, friendly and professional manner. Be sure to introduce yourself, including your job title. Offer to hang up the patient's coat.
2. Ask the patient to complete the Patient Registration, Health and Dental History forms. Offer assistance if needed. All new patients must fill out these forms prior to being seen for treatment or hygiene, even if he or she is a "one-time-only" patient. See samples of these forms below.
3. If there is an unforeseen delay in the schedule, offer the patient a beverage (coffee, tea, juice, water, etc.)
4. Inform appropriate staff, using the computerized communication system, that the new patient has arrived.
5. While the patient is completing the forms required, create the patient chart.
6. Double-check the forms for completeness (DOB, SS#, insurance information, allergies, medical problems, patient signature, etc.). Add any necessary stickers to chart. Enter needed information into computer to complete patient and account screens.
7. Inform the appropriate person (assistant or Hygienist) that the patient is ready. (You may need to seat the patient yourself if all clinical personnel are busy.)
8. If patient has insurance, and if insurance hasn't been verified, fill out the form and give it to the Accounts Manager for immediate verification.

PATIENT REGISTRATION FORMS

The following forms are given to all new patients to read and complete before their first appointment begins. These forms are kept ready on clipboards at the Receptionist's desk to be handed to new patients entering the reception room.

The forms consist of:

- Welcome Letter
- Patient Dental History
- Medical Treatment History
- Patient Information
- Our Financial Policy
- Our Appointment Policy

It is imperative that these forms are filled out completely and signed by each patient before they are seen for treatment. Ensure all questions are answered on the medical history form. There should be no blanks. It is the responsibility of the person who first receives the form from the patient, whether the Receptionist or assistant, to ensure that there are no blanks spaces. If there are blank spaces, that person needs to either return the history to the patient for completion, or question the patient as to the answer.

In the event that the patient is not compliant when filling out all necessary forms, the Receptionist is to find out the specific objection and professionally handle the patient's concern. If they still refuse and there is no logical reason for their refusal, inform the patient that it is office policy that he/she cannot be seen until all forms are complete. If they still refuse, pass the patient to the Office Manager for her decision to either refer the patient elsewhere or have the doctor see him.

SAMPLE NEW PATIENT REGISTRATION PAPERS

Insert a sample of new patient registration papers here.

CREATING NEW PATIENT CHARTS

To create new patient charts:

1. Pull the New Patient Call-In forms for all the next day's new patients. Match them with the patient routing slips.
2. When a patient comes in for his/her appointment, activate them in the computer. Pull up "status" in the menu and enter data for "here."
3. Get the appropriate patient chart labels.
4. Use the first 2 letters of the last name and place the labels on the chart. Place a folder label on the folder. Also, place a label on the account folder. Place any necessary medical alert/pre-medicate labels on chart. Place stickers on the exterior and interior of patient charts.
5. Separate doctor charts from hygiene charts and put each set in the order the patients are scheduled. (The first patient on the doctor's schedule should be the first chart; the second patient should be the second chart and so on.)
6. If you notice that a new patient has insurance but it hasn't been verified, confirm this with the Accounts Manager and if she is "swamped," verify it. You will know whether or not the insurance has been verified by looking at the bottom half of the Insurance Verification Form. If the questions have been filled out, then it has been done.
7. Make up BLANK NP folders during down time!

SAMPLE NEW PATIENT CHART

Insert a sample of a new patient chart here.

SAMPLE ACCOUNT FOLDER

Insert a sample account folder here - only if you maintain separate account folders for your patients.

ROLE PLAYING AND PROCEDURE DRILLS

Information: The following procedures are to be repeated as many times as necessary until you can complete each one correctly and with confidence. This is not a test. The purpose of role-playing and reviewing these procedures is to help you develop accuracy and professionalism in your skills. The only way to develop

a high level of skill is with practice and more practice. Therefore, all the procedures need to be approved by a qualified employee, Office Manager or Dentist by signing their name on the line under the applicable role-play or practice procedure drill.

1. **Role-play with a qualified employee, our procedure for calling in a prescription for an active patient. Include all administrative responsibilities for this procedure. Repeat as necessary until you can do so with confidence. Signed:**

2.

3.

4.

2. **Role-play with a qualified employee, our procedure for "handling price shoppers." Repeat as necessary until you can do so with confidence. Signed:**

3.

4.

5.

3. **Role-play with a qualified employee, the exact procedures for a patient who has one of the "four conditions" per our procedure "New Patients who Require Pre-Medication." Repeat as necessary until you can do so with confidence. Signed:**

4.

5.

6.

4. **Have the senior dentist explain what could potentially happen to a patient during dental or hygiene treatment, if they have ever had a heart murmur, joint replacement, rheumatic fever or any history of heart disease.**

Signed:

(senior dentist signature only)

5. Role-play with a qualified employee, our procedure for the four steps to handling an established patient. Repeat as necessary until you can do so with confidence. Signed:
6.
7.
8.
6. Role-play with a qualified employee, our procedure for the eight steps to handling a New Patient. Repeat as necessary until you can do so with confidence. Signed:
7.
8.
9.
7. With a qualified employee observing and available to answer any questions you may have, fill out all of the New Patient forms. Time yourself to see how long it takes for an average patient. Signed:
8.
9.
10.
8. With a qualified employee observing and available to answer any questions you may have, go through the procedure for making up a new patient chart. Repeat as necessary until you can do so with confidence. Signed:
9.
10.
11.

PATIENT INFORMATION

As you become familiar with the patients, you will know a little more about them and will be able to talk to them about their interests, etc. This is very important. Make a point of bringing up what you talked about last time they were in. For instance, if the patient just went on vacation, ask them how it was. If the patient had a baby, got a new job, is looking for a job, just got married, had a ballgame, went to a ballgame . . . anything! It makes the patient feel much more comfortable with us if we care enough to remember a thing or two about them.

If you don't remember anything about the patient, ask if anyone else does. If not, look at the patient's information and see if there were anything you would feel comfortable talking to them about. For instance, if the patient's medical history shows that he has two children, ask how old. If the patient works for AT & T, ask if he knows Mr. _____________ (another patient who also works there). Be creative! If you are really interested, there's almost always something that you can find in common with someone.

We are here to deliver quality dentistry in a very friendly and caring atmosphere. Being friendly and caring means being honestly interested in our patients and communicating that interest. It does not mean telling the patients about you and your personal life. It's all about the patient not about US. US can be discussed after hours when our work is done. Thank you for understanding this very important part of the key to a successful practice.

CONTACT NOTES

Any time contact is made with a patient a note must be made. This allows everyone to be able to know what was said.

To do this, go to the patient screen and then:

In "family file," go to patient notes (double click) and enter the note there.

KEEPING THE SCHEDULE ON TIME

As Receptionist, it is your responsibility to make sure that patients are arriving and being seen on time.

To do this, you must have the cooperation of the clinical staff, as well as good organizational skills. As soon as a patient arrives, the status in the computer is changed from "confirmed" (green) to "here" (blue). This process lets the assistant and doctor know if the patient is early or late and how much time they have until the patient needs to be seated. At approximately 5 minutes past the appointment time, if the patient is still in the reception area, the Receptionist is to go to the operatory and find out from the doctor or Hygienist how long they think they will be.

At this point, the Receptionist will explain to the waiting patient why we are running behind and give an approximation of how much longer it will be. The Receptionist will find out, at this time, what help is needed to get the clinical staff

back on schedule. The Receptionist will then inform the team, so the available and appropriate staff member can provide needed assistance.

It is always better to originate this type of communication to the patient as opposed to “avoiding” telling the patient we are running behind. Don’t be shy or nervous about telling the patient; just tell them with a smile and a genuine concern for their time.

ENCOURAGING PATIENT REFERRALS

When patients have a good experience at our practice, we want them to refer their friends and family. By giving gift certificates and “Patient Referral” cards to established patients, the Receptionist can encourage new patient referrals. This is an important aspect of increasing the number of new patients coming to our office.

We are proud of the quality dentistry we deliver and we know our practice is one of the most friendly and caring offices in the area, and most likely in the state. There are many people in our community who are not receiving the kind of personalized care they deserve and we need to take responsibility for doing everything we can to reach those people.

So, please encourage our “happy” patients to refer their friends and family.

SAMPLE PATIENT REFERRAL CARD

Insert a sample of your patient referral card here.

PATIENT TESTIMONIALS

The largest barrier for patients seeking and receiving dental care is fear of the needle and drill.

We feel it is our responsibility to help established patients and potential patients in the community overcome this fear as much as possible. To assist us in this effort, we have put together a Patient Testimonial book. This book is kept in the reception area for our patients (especially new patients) to review. Hopefully, this book will help patients to relax more, knowing they are in good hands.

When a patient is checking out and expresses a good experience, the Receptionist should ask if they would please share their good experience and write a testimonial. These forms are kept at the front desk. If a patient is shy or embarrassed (possibly) of their writing style, language barrier, etc., the Receptionist should offer to write it for them in the patient’s words so all they have to do is sign it.

Patients may also take the form home and send the testimonial back if it is more convenient. The completed forms get placed in a clear sheet protector in the Patient Testimonial book.

SAMPLE PATIENT TESTIMONIAL

Insert a sample of a patient testimonial here.

SAMPLE LETTER SENT TO PATIENT ABOUT WRITING A TESTIMONIAL

Insert a sample of a letter sent to a patient about writing a testimonial.

TRACKING THE NEW PATIENT REFERRAL SOURCE

Every Friday, the Receptionist will print a “Patient Referrals” report listing all new patients for that week and their referral source.

The Receptionist is responsible for entering the referral sources for all new patients we see into the computer.

The following is a sample only. Write in your own specific instructions.

1. Double click on "List in Office Manager"
2. To print the new patient list for the week/month:
   - Click Lists
   - New Patient
   - Change to appropriate date or week
   - Click print

SAMPLE NEW PATIENTS WEEKLY REPORT

Insert a sample of your new patients weekly report here.

YEAR TO DATE REFERRAL REPORT

At the end of each month, the Receptionist will run a year-to-date new patient list and a year- to-date Patient Referrals Report. From these reports, values will be determined for each Referral Source and the Office Manager will complete a year-to-date Referral Source Report.

This report will give the doctor the information necessary to determine if the marketing budget is being allocated wisely. From this report, future-marketing decisions can be projected, and we can ensure we are acknowledging our referral sources appropriately.

SAMPLE YTD REFERRAL SOURCE REPORT

Insert a sample of the Year To Date Referral Source report here.

GIFTS FOR PATIENT REFERRALS

A gift certificate will be issued to existing patients who refer new patients to our practice. The type of certificate issued will depend on the referral source. Two types of certificates will be awarded:

1.

RESTAURANT

$20.00

2.

MOVIE THEATER

$20.00

The Receptionist will issue gift certificates weekly. This will be determined after reviewing the patient referral report and using good judgment as to the patient's anticipated preference for a gift. If you know, by conversation with the patient, a different gift such as flowers or a bag of flavored coffee would be more appropriate, then, by all means give the patient *that* instead of a gift certificate.

GIFTS FOR REFERRALS THAT REQUIRE EXTENSIVE TREATMENT PLANS

It's a very good feeling to know that some of our patients appreciate our practice enough to continually refer their friends and family to us for quality dentistry. We know they don't expect anything in return, but we like to thank them for their trust, simply because we appreciate it.

A $50.00 Fruit Basket from Florist Name (999-0000) will be sent to established patients that refer new patients to the practice for extensive dental care. When significant treatment, in excess of $3,000 dollars is completed, the new patient's referral source (our established patient) will be sent the fruit basket. When an individual patient refers more than one patient with extensive treatment, a

different $50.00 gift (according to the patient's preferences) may be sent (e.g. several theatre tickets, gift certificates to their favorite restaurant, bottle of wine, etc.).

The Office Manager and/or senior dentist have the option of rewarding the established patient with a more expensive acknowledgement such as tickets for two to a local sporting event or a concert featuring their favorite artist.

Other doctors who refer patients to us are acknowledged through reciprocal referrals. If another practice, with whom we rarely reciprocate, refers us patients, our senior doctor will decide what kind of gift or acknowledgement would be appropriate for that doctor or group of doctors.

In all cases, when an established patient refers someone to us, no matter what the outcome, our staff should sign a *Thank You* card/letter so it can accompany a gift or be sent by itself.

THANK YOU FOR THE REFERRAL LETTERS

At the end of every month, the Receptionist will print a "Thank You For The Referral" letter to send to each established patient who referred a new patient in the past month. The Receptionist will select which type of certificate to send with the thank you letter. The letters will be mailed on the first workday of each month.

The Receptionist will post which certificate was awarded in the referring patient's transaction screen.

The following is a sample only. Insert your own software instructions for this procedure.

TO PRINT "THE THANK YOU FOR THE REFERRAL LETTER":

- Click on: "Quick Letters" in "Appointment Book"
- Select Patient
- Create letter

- Insert letterhead face up – heads up
- Print

SAMPLES OF THANK YOU LETTERS

Insert a few samples of different letters that can be sent thanking the referring source.

STAFF MEETING AGENDAS

As the Receptionist, you are responsible for printing staff meeting agendas. The general outline is located in Microsoft Word in the "____________" folder.

The meeting is titled "Agenda." The outline is to be filled out with current dates and information. The day prior to the staff meeting, the Receptionist will discuss the topics for the meeting with Dr. [name]. Before the meeting, print a copy for each staff member. Distribute at the meeting.

OFFICE SUPPLY PURCHASING AND BUDGET

As the Receptionist, it is your responsibility to maintain and order office supplies. Be sure to keep minimum quantities on hand at all times so there is never a need for an emergency order. Since we operate on a budget for all supplies, it is important that you monitor the front office supplies closely to ensure you won't run out of key supplies before the end of the month. By working from a budget, we control expenses better than if we have "carte blanche" spending.

To order office supplies:

1. Make a list of all needed supplies.
2. Fill out a request form, include tax, and forward it to the Office Manager.

3. If we have not gone over the budget for the month, the supplies will be ordered/ purchased. If we have gone over our budgeted amount for the month, you will need to put in an Emergency Order Request form to Dr. [name] before ordering any supplies.
4. Either the Office Manager or delegated staff person will purchase the supplies.
5. Once the supplies are purchased, they will be given to you to store appropriately.

RECORD RELEASE AUTHORIZATION FORM

If a patient has x-rays from a previous dentist and would like to have them forwarded to our office, have the patient sign a Record Release form. Be sure to get the dentist's name, phone and address.

Always make a copy of the form and file it in the patient's chart.

If the patient is not scheduled when the x-rays arrive, send a written memo to the Scheduling Coordinator informing her that the x-rays requested have been received and asking her to schedule the appointment with the Dentist or Hygienist.

SAMPLE RECORD RELEASE AUTHORIZATION FORM

Insert a sample of the record release authorization form here.

MAIL DISTRIBUTION

The Receptionist distributes all mail. Mail is distributed as follows:

1. All returned X-rays go into the patient's chart.

2. All checks, private and insurance, plus insurance information, is given to the Accounts Manager, so she can enter it into the computer.
3. All clinical supply information is put in the lead assistant's mailbox.
4. Dentistry Today and Dental Economics magazines are put in Dr. [name]'s mailbox.
5. All non-technical magazines are put in the reception area by the Receptionist and kept in an orderly fashion every day.
6. Hygiene related material is put in the lead Hygienist's mailbox.
7. All other mail is given to the Office Manager.

PATIENT MAIL RETURNED WITH NO FORWARDING ADDRESS

The following can be applied to any patient mail returned by the postal service with no forwarding address.

1. Pull up the Patient Screen in the Family File and attempt to reach the patient by telephone to obtain the correct address.
2. If the new address is received, re-route the letter/postcard to the correct address.
3. If there is not a valid phone number and the patient cannot be contacted with the information we have listed but you know another patient referred them, attempt to obtain new information from that source.
4. If no information is obtained through a referral source, call directory assistance to obtain a new phone number or address.
5. If the above attempts fail to produce a current address, consider the patient to be "inactive." Be sure to make the patient inactive through the Account Screen in the Family File by double clicking on patient information, go to "patient," scroll down to inactive, go to continuing care and delete. (See note below)
6. The returned piece of mail should be placed in the Patient Chart with your initials, and the date.
7. Go to the Patient Screen in Family File, double click on "notes" and indicate the mail was returned with no return address.

NOTE: If the patient has a balance, it is important not to make the account inactive, so the Accounts Manager can pursue the outstanding balance. "Flag" the patient's account by inserting the past due balance or collections.

MAINTAINING THE POSTAL METER

The Receptionist is responsible for maintaining the office postal meter. This includes all postal metering, maintenance and supply ordering.

Our _____________ Postal Meter Account # is ________________.

When the postage amount in the meter falls below $50.00, the Receptionist sends a request form to the Office Manager for more postage. The current estimated amount of postage used per month is $500.00.

The following is a list of numbers at ________________(your postal meter company name).

- Billing Inquiries
- Sales and General Information
- Equipment repair
- Supplies – Orders/Billing
- Postage by phone

All meter, scale operating guides and forms are located in the _________ drawer at the receptionist desk.

OFFICE APPEARANCE

The Receptionist needs to inspect all areas of the office on a daily basis, inside and out, to ensure all areas appear neat and clean. If necessary, cleaning supplies are located ___________.

This inspection and cleaning responsibility does not include the back area of the practice. The assistants and Hygienists are responsible for maintaining the cleanliness in their own areas.

TREATMENT PLAN SHEETS

All patients who have a periodic exam, comprehensive exam or emergency exam must have a Treatment Plan Sheet filled out and placed in their chart. This form must be completed for every patient even if no treatment has been recommended.

A Treatment Plan sheet must have the date of the exam, a hygiene report and any recommended treatment. The Treatment Plan is then forwarded to the Treatment Coordinator to be entered in the computer and presented to the patient.

Anytime there is a change in treatment (a change from the original treatment plan) a new treatment plan form is to be used.

This form will have the new recommended treatment and will be brought to the Treatment Coordinator, who will present it to the patient before treatment resumes.

No treatment is ever started until the patient has signed a treatment plan.

Any deviation in this policy may result in a communication breakdown as well as confusion and upset for the patient.

SAMPLE TREATMENT PLAN SHEETS

Insert a sample of your treatment plan sheets here.

X-RAYS

ALL PATIENT'S MUST HAVE X-RAYS.

If a patient refuses to have films taken, he or she cannot be a patient here. If, after explaining the need for x-rays and the precautions and risks associated, the patient still does not want the x-rays, he/she will be referred out.

No patients are allowed to sign a refusal of x-ray form. If patients have signed these forms in the past and wish to continue with this habit, we will copy and forward any films they may have to another dentist.

The proper procedure for explaining the need of x-rays is outlined below. Patients may have many excuses and reasons for not wanting x-rays, but in this office we MUST have them.

Following are the reasons for having x-rays taken:

1. Undiagnosed decay between teeth, under the gum line and all fillings.
2. Periodontal bone loss.
3. Impacted teeth.
4. Cysts.
5. Root fragments.
6. Abscesses.
7. Fractured teeth or jaws.
8. Tumors, cancerous growth and other disease.

RECEPTIONIST DAILY CHECKLIST

1. Turn on your computer station.
2. Change the back-up tape and insert a new daily tape.
3. Make coffee.
4. Make the music selection and turn on stereo. (No heavy rock, etc.)
5. Participate in the morning huddle.
6. Retrieve messages and turn off the phone service. Route all messages to the appropriate people.
7. Answer incoming calls. Be very friendly with each patient while on the phone.
8. Enthusiastically greet patients and offer beverages. Assist new patients with filling out forms, if needed.
9. Inform the assistant or Hygienist that the patient has arrived. Ensure that patients are seen on time and not kept waiting.
10. If New Patient:
11.
    a. Activate the account and patient in computer
    b. Create a new patient chart
    c. Enter any extra info needed from the patient info form
    d. Provide the medical history and billing info form
    e. Enter the referral source for the new patient

11. Ask established patients when they arrive if any of their information has changed since their last visit.
12. Sort and distribute daily mail.
13. Meter all mail and place in the outside mailbox.
14. Check all charts to ensure progress notes are complete and all signatures are attached.
15. File charts.
16. Liaise with Accounts Manager and Scheduling Coordinator as needed.
17. Calculate and enter the new patient stat for the day.
18. Turn on the appropriate phone answering machine for dentist on call at end of the day.
19. Turn off workstation and printers.
20. Empty coffee and tea containers in the reception room; turn off all lights, television, stereo, coffee makers and copiers.
21. Wash dirty dishes, cups and glasses.
22. Put out charts for the next the workday.

RECEPTIONIST WEEKLY CHECKLIST

1. Review how many new patient forms are on hand. Copy as needed.
2. Review how many new patient charts are on hand. Assemble as needed.
3. Thursday: Cross-reference the first visit report with the patient referral report to verify the referral source. Be sure to add any missing sources. You can find these sources on the call-in sheets or patient information sheets.
4. Last Week of Month: Print and send thank you letters and appropriate certificates for new patient referrals, as per the procedure.

ROLE PLAYING AND PROCEDURE DRILLS

Information: The following procedures are to be repeated as many times as necessary until you can complete each one correctly and with confidence. This is not a test. The purpose of role-playing and going over these procedures is to help you develop accuracy and professionalism in your skills. The only way to develop a high level of skill is with practice and more practice. Therefore, all of the procedures need to be approved by a qualified employee, Office Manager or

Dentist by signing their name on the line under the applicable role-play or procedure drill.

1. Role-play with a qualified employee, all the steps you take when we are running behind schedule. Repeat as necessary until you can do so with confidence.   Signed:
2.
3.
4.

2. If our office has a Patient Testimonial Book, read through all of the testimonials. If the office does not have one, get permission from the Office Manager to create one and do so within the next two weeks. Signed:
3.
4.
5.
6.

3. With a qualified employee, go through the procedure for printing "the thank you for the referral letter." Repeat as necessary until you can do so with confidence.   Signed:
4.
5.
6.
7.

4. With a qualified employee, go through the steps for ordering front office supplies. Repeat as necessary until you can do so with confidence. Signed:
5.
6.
7.
8.

5. With a qualified employee, go through the seven steps for handling returned patient mail with no forwarding address. Repeat as necessary until you can do so with confidence.   Signed:
6.
7.
8.
9.
10.

6. With a qualified employee observing and answering any questions you may have, go through each step of the Receptionist Daily Checklist. Repeat as necessary until you can do so with confidence.
Signed:
7.
8.
9.
10.
11.
7. With a qualified employee observing and answering any questions you may have, go through each step of the Receptionist Weekly Checklist. Repeat as necessary until you can do so with confidence.
Signed:
8.
9.
10.
11.
12.

FINAL EXAM

This is a timed exam that must be taken at our office under the supervision of the Office Manager or dentist. You have one hour to complete the 27 questions. Use separate paper and please indicate your answers with the corresponding question on this final exam. Turn your answers into the Office Manager upon completion.

If any answers are incorrect, you will be referred back to the appropriate procedure for a review and may take this opportunity to re-write your answer to ensure you get 100% of the questions correct. The same is true for any procedure drills conducted during your training.

Exam

1. **What is the maximum number of times the phone should ring before being answered?**
2. **What are you supposed to do when a new patient calls our office to make an appointment?**
3. **In your opinion why is it important to stay on top of the "flow of patients" through our office?**
4. **What can you do if a patient has been waiting too long?**
5. **What is our procedure if someone calls in for a prescription and they have never been seen in our office?**
6. **What do you do when an employee receives a call that is not an emergency?**
7. **What is our procedure regarding phone calls being given to Dr. [name]?**
8. **When an active patient calls for a prescription, what information must you document and where do you put it?**
9. **In your own words, describe why a professional, effective and caring manner when answering all calls, especially new patient calls, is extremely important to our practice.**
10. **If a patient answers yes to having any of the four conditions for pre-medication, what are the steps you must take?**
11. **What do you do if a new patient refuses to fill out and sign all of our forms?**
12. **What are the six steps to making up a new patient chart? Write these steps in your own abbreviated version for simplicity. Do not "just copy" the steps from the procedure.**
13. **In your own words, describe why it's important to talk to patients about their interests and not yours.**
14. **Approximately how many minutes past the patient's appointment time do you wait before going to the dentist or Hygienist to find out how much longer they will be?**
15. **In your own words, describe why it is important for patients to refer their friends and family.**
16. **What should you do when a patient tells you what an enjoyable experience they just had?**

17. In your opinion, what value to the practice is the weekly new patient referral source report?
18. What are the two types of gift certificates we issue at our practice? Are these your only options?
19. What do we give new patient referral sources (not including doctor referral sources) whose referrals have had dental treatment in excess of $3,000?
20. What should be sent to all "established patient" referral sources, regardless of the production outcome of the patient they refer to us?
21. What do you do if you run out of copy paper before the end of the month and you're already over the budget?
22. A new patient has arrived for their initial exam but says they don't want x-rays taken because their previous dentist just took a full set one month ago. What do you do?
23. How do you know where to distribute the mail when it comes in?
24. What do you do if the value of postage left in our postage meter drops below $50?
25. What must a Treatment Plan sheet have on it and where does it go after the doctor has filled it out?
26. What is the exception to the rule for allowing a patient to start treatment without signing the Treatment Plan?
27. What do you do if a patient refuses to have x-rays taken?

ATTEST

I attest that I understand all of the procedures contained in this Receptionist Manual. I have completed all of the role-playing, procedure drills and correctly answered all of the final exam questions contained herein. I also have the required initials of the appropriate staff as instructed.

Signed:

Date Completed:

Print Name:

Supervisor Signature:

APPRENTICESHIP CHECKLIST

Date Started: _________________

Date Completed: ______________

Name

The purpose of this apprenticeship checklist is to ensure, through observation and not written exams, that you can effectively perform all of the duties of your job description. There are only two people authorized to sign off on each of the apprenticeship points, the Office Manager or the Dentist/Owner. Please ensure you get each point signed with the appropriate date.

The maximum amount of time allowed to complete this apprenticeship checklist is 90 days from beginning to end.

Once complete, you will be eligible for our bonus program.

Completion of our training and apprenticeship program does not guarantee employment. It only indicates you have the “ability” to perform your duties and functions as an experienced and trained employee. There may be additional classes you will need to take outside of our dental office to improve your abilities and stay abreast of our ever-changing profession.

We hope you set a good example in every way to other staff. The Office Manager will meet with you a minimum of once a week to review your progress on this checklist until it is complete. The Office Manager will refer you to the appropriate procedures or other references for any needed review or for new information relating to your job.

Congratulations on arriving at this point in your training program.

1. Greets all patients warmly and with a smile.
   Signature: ________________________________ Date: ___________

2. Communicates well with all patients.
   Signature: ________________________________ Date: ___________

3. Is very effective at getting new patients to completely fill out all forms.
   Signature: ________________________________ Date: ___________

4. Assists the Scheduling Coordinator with confirming patients and has a proven track record of being very effective at this procedure.
   Signature: ________________________________ Date: ___________

5. Answers phones with a smile and is extremely friendly while being effective and quick at answering questions.
   Signature: ________________________________ Date: ___________

6. **Contributes greatly to an even flow of patients and high level of production in the office and effectively communicates with the "back" to ensure patients are seen as close as possible to their scheduled time.**
   Signature: ________________________________ Date: ___________

7. **Knows how to print all daily, weekly and monthly reports applicable to the Receptionist position.**

Signature: ________________________________ Date: ___________

8. **Works closely with the Scheduling Coordinator and Treatment Coordinator on getting all patients in the door and completing their treatment plans.**

Signature: ________________________________ Date: ___________

9. **Cooperates with all other staff and doctors.**

Signature: ________________________________ Date: ___________

10. **Sets a good example for other staff.**

Signature: ________________________________ Date: ___________

11. **Contributes to an upbeat and harmonious dental practice through actions and attitude toward patients, staff and doctors.**

Signature: ________________________________ Date: ___________

12. **Uses the appropriate communication forms and refrains from asking others to remember things that should have been put on a memo or other appropriate form.**

Signature: ________________________________ Date: ___________

13. Keeps patients informed of our internal referral program and encourages patients to refer family and friends.

Signature: ________________________________ Date: ___________

14. Adheres to the general guidelines and procedures of our office.

Signature: ________________________________ Date: ___________

15. Maintains good personal hygiene.

Signature: ________________________________ Date: ___________

16. Always maintains a well-groomed personal appearance.

Signature: ________________________________ Date: ___________

17. Refers others to appropriate company guidelines as opposed to giving verbal opinions on procedure or guideline matters.

Signature: ________________________________ Date: ___________

18. Has a proven track record of efficiently getting each step on the daily and weekly Receptionist checklist done at the appropriate times.

Signature: ________________________________ Date: ___________

19. As a back up to the Scheduling Coordinator, has the ability to effectively schedule every type of appointment we have according to our established procedures.

Signature: ________________________________ Date: ___________

20. Has a proven track record of accuracy and effectiveness at ensuring lab cases are present before the patient arrives for their insert.

Signature: ________________________________ Date: ___________

21. **Takes ownership for a % of appointments. Keeps statistics and actively assists the Scheduling Coordinator to ensure this statistic stays in a good range, as evidenced by the monthly overall statistic.**

Signature: ________________________________ Date: ___________

ATTEST

I attest that ___________________________________ has successfully demonstrated competence on all of the above points.

Signed

___Date

(Owner signature)

Dentrix is used in this manual to demonstrate standard front desk workflows. Exact screen names may vary by version.

Common Dentrix Functions Referenced:

- **Patient Information: Family File > Patient Information**
- **Scheduling Appointments: Appointment Book > Select Provider/Time > Enter Procedures**
- **Treatment Plans: Ledger > Treatment Plan > Create / Present**
- **Posting Payments: Ledger > Enter Payment > Allocate by Procedure**
- **Insurance Claims: Ledger > Insurance > Create & Send Claims**
- **Reports: Office Manager > Reports**

If your practice uses a different PMS, equivalent workflows will be substituted without cost upon request.