I. Reception Organization & Management
   - Purpose of the Receptionist
   - Bad Etiquette
   - Introduction to HIPAA
   - Handling Walk-in Salespeople
   - Handling Walk-in Patients

II. Telephone Skills & Etiquette
    - Phone Training
    - How to Take a Good Message
    - Excellent Telephone Skills
    - Lunches and Phone Coverage
    - Dental Emergencies
    - Patients Asking for X-Rays
    - How to Handle Phones in Front of Patients

III. Customer Service
     - Conversations with Patients
     - Waiting
     - Handling Late Patients
     - How to Handle Disgruntled Patients
     - How to Hand Off Clients
     - Efficiently Handling the Check Out Process
     - Asking for Referrals

IV. New Patient Calls
    - Answering New Patient Calls
    - Getting New Patients Scheduled in 48 Hours
    - New Patient Interview
    - Answering PPO Questions
    - Second Opinion and Shoppers

V. New Patient Appointment
    - Make a Good First Impression
    - New Patient Visit
    - Entering New Patient Information
    - New Patient Information – How to be Efficient
    - Picking the Right Insurance for a New Patient

VI. Introduction to Dental
    - The Right Amount of Communication
    - Diagnostic / Preventative
    - Restorative
    - Missing Teeth
    - Perio-Gum Disease
    - Tips for New Employees

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I. Understanding Scheduling
- Dental Office Scheduling
- Know Your Scheduling Policy
- What is Block Scheduling?
- Putting Blocks into the Schedule
- Effective Scheduling for Doctor & Hygienist
- Monthly Goal and Scheduling
- Using QuickFill Effectively

II. How to Get Patients to Schedule
- Importance of Hand Offs to Scheduler to Get Patient to Schedule
- Getting Patient to Schedule Next Appointment
- Getting Patients to Schedule Six Months
- Importance of Pre-Booking
- How to Offer an Appointment
- Handling Scheduling Issues
- Doctor Schedule vs. Hygiene Schedule

III. How to Handle Cancellations
- How to Handle Cancellations
- Cancellation Phone Calls
- Using Confirmation Calls to Fill Schedule
- Steps to Fill Last Minute Cancellations
- Last Minute Hygiene Cancellations & No Shows
- Dealing with Cancellations
- Asking for Referrals

IV. Confirming Appointments
- Confirmation Calls
- Confirmation Calls with Patient Response
- Next Day Review
- Next Day Reviewer
- Shake the Flakes
- Confirming Suggestions & Resources

V. Productive Scheduling for the Doctor
- Basics of How to Build a Productive Schedule
- Block Scheduling for a Productive Doctor
- Time Study
- Filling Openings in the Schedule
- Scheduling Outstanding Treatment
- Red Flags in the Doctor’s Schedule

VI. Building an Efficient Hygiene Schedule
- Hygiene Scheduling
- Overdue Recare Calls
- Duties of a Hygiene Coordinator
- Confirming Hygiene Appointments
- Periodontal Overview
- Tips to Keep Hygiene Full
I. Consultations
- Purpose of the Treatment Coordinator
- What Doctors Look for in a Treatment Coordinator
- The Importance of Consultations
- How to Do Consultations Chairside
- Handling Patient’s Questions in Consultations
- Can’t it Wait?

II. Treatment Planning
- Preparing for a Consultations / Treatment Plan Presentation
- Treatment Coordinator Helping with Questions in Consultations
- Helping Patients from First Call to Treatment Presentation
- Dealing with a Patient Who Wants to do “Partial Treatment”

III. Discussing Money
- Asking the Patient to Pay
- Being Prepared to Collect a Patient Balance
- Emergency Appointment: Discussing Money Prior to Treatment
- Getting Patients Closed for Treatment and Finances

IV. Patient Acceptance
- Patients Need to Understand Their Treatment Plan
- Why Front Desk Consults Don’t Work
- Case Acceptance Interview with Doctors
- Post Op Calls

V. Insurance Discussion
- Calculating Dental Insurance Benefits
- I am Only Doing What the Insurance Covers
- How to Handle the “Insurance Focused” Patient
- Looking Ahead to Avoid Insurance Issues
- Communicating with Patients about Insurance and Financial Obligations

VI. Unscheduled Treatment
- Outstanding Treatment Plan Meeting
- Follow Up Treatment Plan Calls
- Following Up on Unscheduled Treatment
I. Understanding Insurance
- Responsibilities of the Financial Coordinator
- Duties of the Financial Coordinator
- How Dental Codes Work
- Insurance Terms
- Benefit Breakdown Form
- Understanding Insurance Claims

II. Dealing with Insurance
- Understanding Employer versus Insurance Company
- Coverage Book
- Fee Schedule versus Coverage Book
- Matching the Correct Patient with the Correct EOB/Payment
- Sending Narratives and Additional Information
- Tips for Entering Insurance Checks

III. Patient Accounts
- Purpose of the Financial Insurance Position
- Figuring Out Patient Balances – Patient Did Not Pay Last Time
- Explaining a Balance to a Patient
- Account Balances – The Importance of Notes
- Breaking Down the Patient’s Account
- Family Account Billing Issues

IV. Billing Insurance
- Filing Insurance Claims
- Narratives versus Appeals
- Steps for Entering Insurance Payments
- Explanation of Benefits (EOB)
- Important Tips for Entering Insurance Checks
- Entering Insurance Checks

V. Billing Patients
- Balancing Patient Accounts
- Handling Patient Balances Effectively
- Handling and Discussing Account Balances

VI. Outstanding Insurance
- Insurance Claims – The Importance of Notes and How to Use Them
- Outstanding Insurance Claims
- Tips for Calling on Outstanding Insurance Claims
- How to Avoid Outstanding Insurance Claims
- Tips to Get Insurance Claims Paid

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I. **Office Manager Job Duties**
   - Office Manager Responsibilities
   - Writing a Good Job Advertisement
   - Reading Resumes
   - Phone Interview
   - Interviewing
   - Interview Management Style
   - First Week on the Job

II. **Staff Management**
   - Outline for Staff Meeting
   - The Importance of Staff Training
   - Training Employees
   - Counseling an Employee
   - Setting the Tone for the Office
   - Staff Issues
   - Managing Overdue Recare & Outstanding Treatment Calls

III. **Doctor Expectations**
   - What is the Doctor Looking for in an Office Manager?
   - Understanding the Doctor
   - Dealing with Staff Issues with Tony Hatch
   - Tracking Against Goals
   - Raising Fees
   - Office Security

IV. **Patient Control**
   - Morning Huddle
   - Morning Schedule Review
   - Handling Patient Complaints
   - Cancellation Policy
   - Insurance Renewal
   - Scheduling Policies

V. **Team Building**
   - Charity Events
   - Team Building Incentives
   - Bonuses and Games
   - Implementing Change
   - Handling Gossip in the Office