

## Receptionist Training Videos

### 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

## Scheduling Training Videos

### 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

## Treatment Coordinator Training Videos

### 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

## Financial Coordinator Training Videos

### 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

## Office Manager Training Videos

### 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