## Receptionist

### I. Reception Organization & Management
- Purpose of the Receptionist: 7:42
- Bad Etiquette: 6:21
- Introduction to HIPAA: 6:14
- Handling Walk-in Salespeople: 7:15
- Handling Walk-in Patients: 4:04

### II. Telephone Skills & Etiquette
- Phone Training: 12:57
- How to Take a Good Message: 7:26
- Excellent Telephone Skills: 7:45
- Lunches and Phone Coverage: 5:01
- Dental Emergencies: 5:16
- Patients Asking for X-Rays: 7:54
- How to Handle Phones in Front of Patients: 5:49

### III. Customer Service
- Conversations with Patients: 7:04
- Waiting: 6:04
- Handling Late Patients: 8:21
- How to Handle Disgruntled Patients: 7:14
- How to Hand Off Clients: 6:49
- Efficiently Handling the Check Out Process: 3:59
- Asking for Referrals: 7:00

### IV. New Patient Calls
- Answering New Patient Calls: 8:16
- Getting New Patients Scheduled: 4:44
- New Patient Interview: 6:18
- Answering PPO Questions: 6:27
- Second Opinion and Shoppers: 5:29

### V. New Patient Appointment
- Make a Good First Impression: 5:16
- New Patient Visit: 3:34
- Entering New Patient Information: 8:36
- New Patient Information – How to be Efficient: 7:12
- Picking the Right Insurance for a New Patient: 6:42

### VI. Introduction to Dental
- The Right Amount of Communication: 7:46
- Diagnostic / Preventative: 6:04
- Restorative: 7:01
- Missing Teeth: 5:01
- Perio-Gum Disease: 4:27
- Tips for New Employees: 8:38
# Scheduling

## I. Understanding Scheduling
- Dental Office Scheduling: 6:04
- Know Your Scheduling Policy: 6:41
- What is Block Scheduling?: 11:46
- Putting Blocks into the Schedule: 6:29
- Effective Scheduling for Doctor & Hygienist: 7:50
- Monthly Goal and Scheduling: 5:37
- Using QuickFill Effectively: 9:47

## II. How to Get Patients to Schedule
- Importance of Hand Offs to Scheduler to Get Patient to Schedule: 7:00
- Getting Patient to Schedule Next Appointment: 3:10
- Getting Patients to Schedule Six Months: 5:16
- Importance of Pre-Booking: 7:06
- How to Offer an Appointment: 6:52
- Handling Scheduling Issues: 7:16
- Doctor Schedule vs. Hygienist Schedule: 7:12

## III. How to Handle Cancellations
- How to Handle Cancellations: 10:21
- Cancellation Phone Calls: 5:27
- Using Confirmation Calls to Fill Schedule: 5:09
- Steps to Fill Last Minute Cancellations: 8:28
- Last Minute Hygiene Cancellations & No Shows: 7:22
- Dealing with Cancellations: 8:38
- Asking for Referrals: 7:00

## IV. Confirming Appointments
- Confirmation Calls: 5:25
- Confirmation Calls with Patient Response: 5:01
- Next Day Review: 4:13
- Next Day Reviewer: 7:16
- Shake the Flakes: 7:13
- Confirming Suggestions & Resources: 9:17

## V. Productive Scheduling for the Doctor
- Basics of How to Build a Productive Schedule: 7:09
- Block Scheduling for a Productive Doctor: 7:53
- Time Study: 8:52
- Filling Openings in the Schedule: 7:13
- Scheduling Outstanding Treatment: 8:38
- Red Flags in the Doctor's Schedule: 6:20

## VI. Building an Efficient Hygiene Schedule
- Hygiene Scheduling: 8:11
- Overdue Recare Calls: 4:13
- Duties of a Hygiene Coordinator: 7:09
- Confirming Hygiene Appointments: 9:17
- Periodontal Overview: 8:31
- Tips to Keep Hygiene Full: 8:13
## Treatment Coordinator

### I. Consultations
- Purpose of the Treatment Coordinator: 8:57
- What Doctors Look for in a Treatment Coordinator: 7:01
- The Importance of Consultations: 6:35
- How to Do Consultations Chairside: 7:46
- Handling Patient’s Questions in Consultations: 6:37
- Can’t it Wait?: 5:49

### II. Treatment Planning
- Preparing for a Consultations / Treatment Plan Presentation: 7:27
- Treatment Coordinator Helping with Questions in Consultations: 6:23
- Helping Patients from First Call to Treatment Presentation: 7:29
- Dealing with a Patient Who Wants to do “Partial Treatment”: 6:29

### III. Discussing Money
- Asking the Patient to Pay: 5:11
- Being Prepared to Collect a Patient Balance: 3:56
- Emergency Appointment: Discussing Money Prior to Treatment: 5:59
- Getting Patients Closed for Treatment and Finances: 5:57

### IV. Patient Acceptance
- Patients Need to Understand Their Treatment Plan: 8:01
- Why Front Desk Consults Don’t Work: 8:01
- Case Acceptance Interview with Doctors: 8:31
- Post Op Calls: 3:17

### V. Insurance Discussion
- Calculating Dental Insurance Benefits: 8:40
- I am Only Doing What the Insurance Covers: 7:44
- How to Handle the “Insurance Focused” Patient: 7:19
- Looking Ahead to Avoid Insurance Issues: 11:29
- Communicating with Patients about Insurance and Financial Obligations: 12:25

### VI. Unscheduled Treatment
- Outstanding Treatment Plan Meeting: 5:15
- Follow Up Treatment Plan Calls: 4:30
- Following Up on Unscheduled Treatment: 9:20
# Financial Coordinator

## I. Understanding Insurance
- Responsibilities of the Financial Coordinator 5:07
- Duties of the Financial Coordinator 7:13
- How Dental Codes Work 8:26
- Insurance Terms 7:17
- Benefit Breakdown Form 8:30
- Understanding Insurance Claims 7:40

## II. Dealing with Insurance
- Understanding Employer vs Insurance Company 10:02
- Coverage Book 8:17
- Fee Schedule versus Coverage Book 8:44
- Matching the Correct Patient with the Correct EOB/Payment 4:43
- Sending Narratives and Additional Information 7:12
- Tips for Entering Insurance Checks 11:16

## III. Patient Accounts
- Purpose of the Financial Insurance Position 7:44
- Figuring Out Patient Balances – Patient Did Not Pay Last Time 6:50
- Explaining a Balance to a Patient 10:04
- Account Balances – The Importance of Notes 7:55
- Breaking Down the Patient’s Account 12:12
- Family Account Billing Issues 6:08

## IV. Billing Insurance
- Filing Insurance Claims 7:15
- Narratives versus Appeals 7:03
- Steps for Entering Insurance Payments 8:57
- Explanation of Benefits (EOB) 11:46
- Important Tips for Entering Insurance Checks 11:16
- Entering Insurance Checks 8:53

## V. Billing Patients
- Balancing Patient Accounts 9:11
- Handling Patient Balances Effectively 7:20
- Handling and Discussing Account Balances 6:30

## VI. Outstanding Insurance
- Insurance Claims – The Importance of Notes and How to Use Them 7:25
- Outstanding Insurance Claims 9:43
- Tips for Calling on Outstanding Insurance Claims 7:09
- How to Avoid Outstanding Insurance Claims 9:41
- Tips to Get Insurance Claims Paid 7:12
# Office Manager

## I. Office Manager Job Duties

<table>
<thead>
<tr>
<th>Task</th>
<th>Duration</th>
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</thead>
<tbody>
<tr>
<td>Office Manager Responsibilities</td>
<td>4:05</td>
</tr>
<tr>
<td>Writing a Good Job Advertisement</td>
<td>9:50</td>
</tr>
<tr>
<td>Reading Resumes</td>
<td>6:38</td>
</tr>
<tr>
<td>Phone Interview</td>
<td>8:47</td>
</tr>
<tr>
<td>Interviewing</td>
<td>9:17</td>
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<td>Interview Management Style</td>
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<td>First Week on the Job</td>
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## II. Staff Management

<table>
<thead>
<tr>
<th>Task</th>
<th>Duration</th>
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<tbody>
<tr>
<td>Outline for Staff Meeting</td>
<td>14:04</td>
</tr>
<tr>
<td>The Importance of Staff Training</td>
<td>2:29</td>
</tr>
<tr>
<td>Training Employees</td>
<td>7:41</td>
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<tr>
<td>Counseling an Employee</td>
<td>7:22</td>
</tr>
<tr>
<td>Setting the Tone for the Office</td>
<td>7:15</td>
</tr>
<tr>
<td>Staff Issues</td>
<td>8:49</td>
</tr>
<tr>
<td>Managing Overdue Recare &amp; Outstanding Treatment Calls</td>
<td>5:46</td>
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</table>

## III. Doctor Expectations

<table>
<thead>
<tr>
<th>Task</th>
<th>Duration</th>
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</thead>
<tbody>
<tr>
<td>What is the Doctor Looking for in an Office Manager?</td>
<td>6:29</td>
</tr>
<tr>
<td>Understanding the Doctor</td>
<td>6:42</td>
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<tr>
<td>Dealing with Staff Issues with Tony Hatch</td>
<td>8:50</td>
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<tr>
<td>Tracking Against Goals</td>
<td>7:21</td>
</tr>
<tr>
<td>Raising Fees</td>
<td>7:42</td>
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<td>Office Security</td>
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## IV. Patient Control

<table>
<thead>
<tr>
<th>Task</th>
<th>Duration</th>
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<tbody>
<tr>
<td>Morning Huddle</td>
<td>7:28</td>
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<tr>
<td>Morning Schedule Review</td>
<td>8:52</td>
</tr>
<tr>
<td>Handling Patient Complaints</td>
<td>10:47</td>
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<tr>
<td>Cancellation Policy</td>
<td>6:24</td>
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<tr>
<td>Insurance Renewal</td>
<td>6:24</td>
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<td>Scheduling Policies</td>
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## V. Team Building

<table>
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<tr>
<th>Task</th>
<th>Duration</th>
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<tbody>
<tr>
<td>Charity Events</td>
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<tr>
<td>Team Building Incentives</td>
<td>2:52</td>
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<tr>
<td>Bonuses and Games</td>
<td>6:25</td>
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<tr>
<td>Implementing Change</td>
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</tr>
<tr>
<td>Handling Gossip in the Office</td>
<td>7:37</td>
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