



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. Hygiene 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

Office Manager Responsibilities	4:05
Writing a Good Job Advertisement	9:50
Reading Resumes	6:38
Phone Interview	8:47
Interviewing	9:17
Interview Management Style	7:51
First Week on the Job	5:53

II. Staff Management

Outline for Staff Meeting	14:04
The Importance of Staff Training	2:29
Training Employees	7:41
Counseling an Employee	7:22
Setting the Tone for the Office	7:15
Staff Issues	8:49
Managing Overdue Recare & Outstanding Treatment Calls	5:46

III. Doctor Expectations

What is the Doctor Looking for in an Office Manager?	6:29
Understanding the Doctor	6:42
Dealing with Staff Issues with Tony Hatch	8:50
Tracking Against Goals	7:21
Raising Fees	7:42
Office Security	8:01

IV. Patient Control

Morning Huddle	7:28
Morning Schedule Review	8:52
Handling Patient Complaints	10:47
Cancellation Policy	6:24
Insurance Renewal	6:24
Scheduling Policies	7:39

V. Team Building

Charity Events	4:04
Team Building Incentives	2:52
Bonuses and Games	6:25
Implementing Change	6:49
Handling Gossip in the Office	7:37