

# 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

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.

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# 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.

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# RETRIVING 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.

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# 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.

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# 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.

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# 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? \_\_\_\_\_

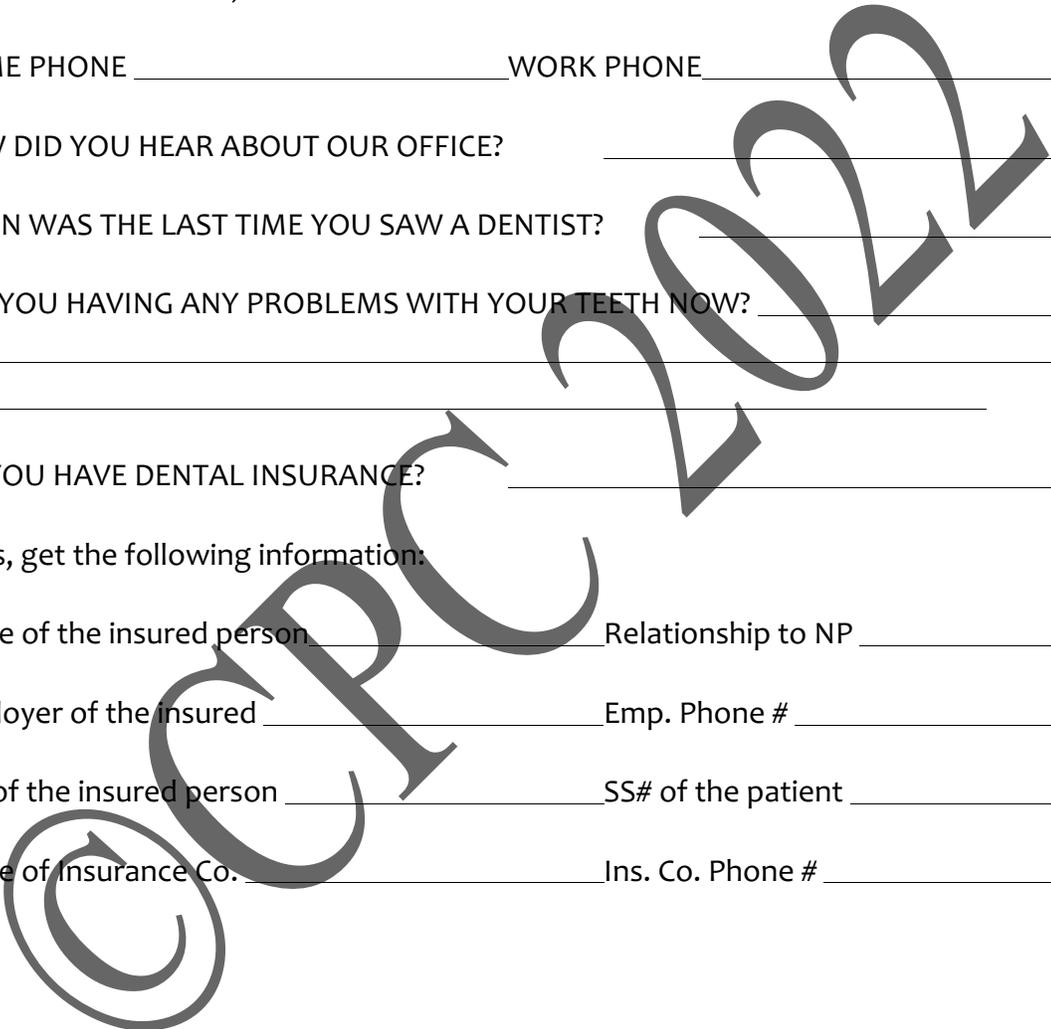
If yes, get the following information:

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 \_\_\_\_\_

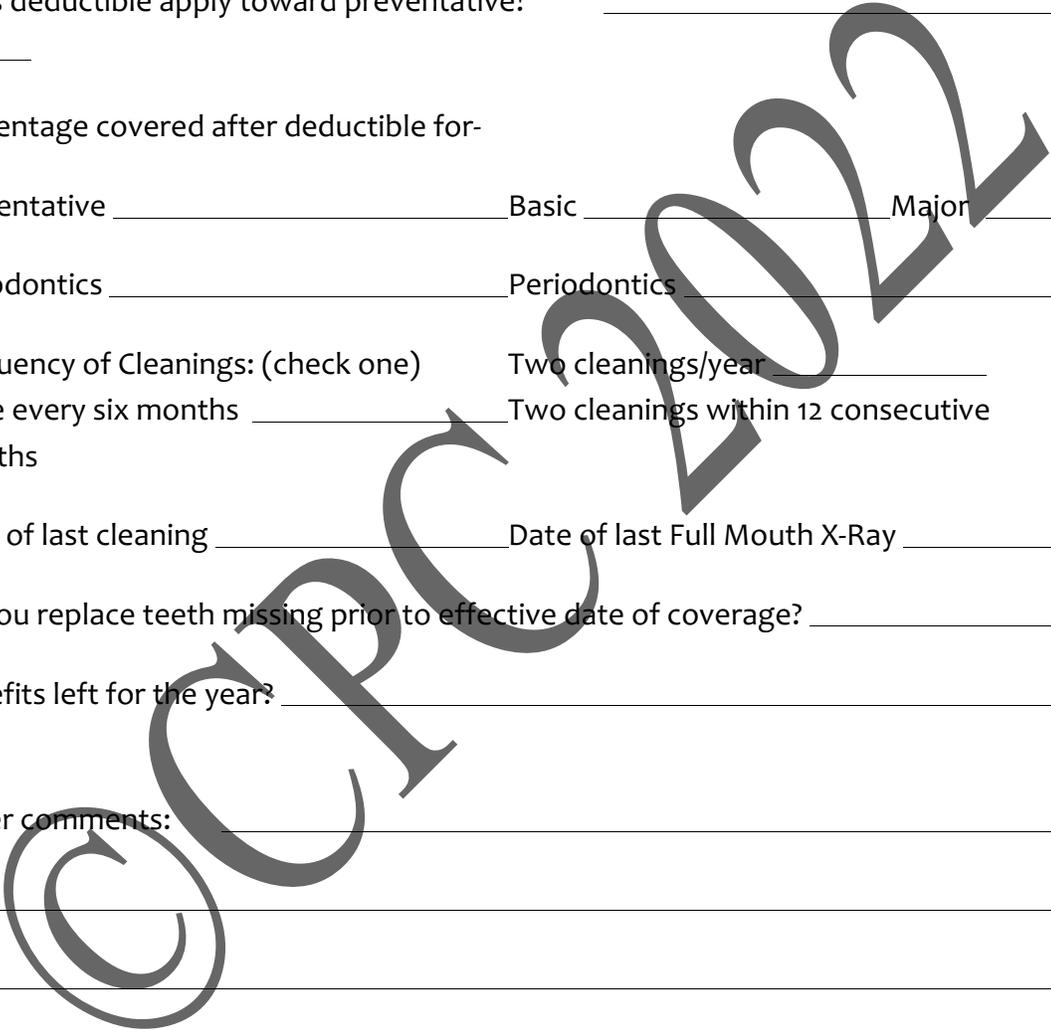
Once every six months \_\_\_\_\_ Two cleanings within 12 consecutive months

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.

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