RevenueWell

Pre-Training Activity Checklist

Welcome to RevenueWell! Thank you for choosing us to handle your practice marketing & patient communication needs.

Please follow the below checklist to get started.

At this time, you should have a training session scheduled with one of our implementation specialists. A typical session lasts about ***1 hour*** and helps you hit the ground running with all the great features RevenueWell has to offer.

To get the most out of your training, please spend some time upfront browsing through the application and completing some settings areas so you don't have to do so with the specialist on the phone.

Log Into RevenueWell

- Follow the link from your registration email *(check your spam folder if you don't see an email from "RevenueWell")* to create your password and accept the initial Terms & Conditions for the RevenueWell service.
- Browse around and become familiar with the interface. Since your system is completing its first synchronization, you may or may not see your patient records at this time. **Your account is not fully active yet, so don't worry about incidentally sending something to your patients.**
- Spend some time watching the **Video Tutorials**, which can be found in the upper right hand corner of each tab.

Complete the Following Areas in the Settings Tab

- **BUSINESS INFO**
  (*Fill in these areas to increase your web visibility)*
  Your Microsite Coupon, General Info, Services Offered, Insurance Accepted, Languages Spoken, Payment Methods Accepted, and Your Team.
- **BUSINESS HOURS**
  Select your Business Hours and any Holidays & Special Day Hours.
- **APPOINTMENT CONFIRMATION**
  Select all appointment reminder attempts you would like to send to your patients, and work through the schedule and message options before the training. If you have questions or need help finalizing your settings, your implementation specialist will assist you during the training session.
- **PATIENT CONNECT PORTAL**
  Select what account information you want to display to your patients.
- **PATIENT ENROLLMENT**
  Review the content of the **"RevenueWell Welcome Letter"** and set the setting to YES so all new patients can automatically be invited to participate.
- **PHONE AND SMS SETTINGS**
  Set your Phone and SMS schedule; our recommended settings are 8am-8pm for both. Carefully review the area titled **"Text Message (SMS) Enrollment"** and speak with your team about your preference.

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Activate Automatic Campaigns

These communications are the backbone of RevenueWell, and are extremely important in keeping your patient base ***engaged***, ***educated*** and ***coming back to your office***.

You don't have to use all of them, but we strongly advise you to use at least some to get the most out of your RevenueWell subscription.

BIRTHDAY CARDS
Automatically sends patients birthday wishes via emails and postcards on the day of their birthday.

EXPIRING INSURANCE BENEFITS REMINDER
Reminds patients to "use or lose" the remaining insurance benefits at the end of their insurance year.

HOLIDAY CARDS
Send patients a card around major holidays like Independence Day, Thanksgiving and the December holidays.

PATIENT REACTIVATION
Audits your charts for patients who haven't come in for an extended period of time, and sends them automatic reminders/incentives to get them back into the office.

Important **Reminder**

No communications will be sent to your patients until after your account has been activated.

POST-OP INSTRUCTIONS
Send patients automatic email post-op instructions after they complete certain services at your office.

RECALL
If your patients don't have a scheduled hygiene visit and their recall date is coming up, this campaign will send emails, text messages, postcards and letters encouraging them to schedule their appointment.

THANK YOU LETTER — REVIEW
Automatically asks your patients for online reviews after their appointment.

THANK YOU LETTER — SURVEY
Automatically asks your patients for feedback on how you're doing.

TREATMENT PLAN FOLLOW-UPS
Monitors your patients charts for proposed treatment plans that haven't been scheduled, and sends your patients treatment plan presentations urging them to schedule their appointment.

WELCOME PACKETS
Sends a welcome letter to patients who are new to your practice. Include a letter from the doctor, PDF forms and other attachments if you wish!