



TREATMENT PLAN CHECKLIST

STEP	TASK	DONE
1.	Let patients know how doing all treatment in one visit will save them time	<input type="checkbox"/>
2.	Let patients know that you offer longer appointments	<input type="checkbox"/>
3.	Ask patient if there is any reason they would not want to do more per visit	<input type="checkbox"/>
4.	Let patients know they are just like other patients	<input type="checkbox"/>
5.	Other patients can get work done in one visit by using a credit card	<input type="checkbox"/>
6.	Other patients choose to get done in one visit and pay a little over time	<input type="checkbox"/>
7.	Other patients create an action plan	<input type="checkbox"/>
8.	Ask which works best for them	<input type="checkbox"/>
9.	Help them to schedule their first visit	<input type="checkbox"/>
10.	Take a deposit if they choose option 1	<input type="checkbox"/>
11.	Help them set up financing	<input type="checkbox"/>
12.	Create an action plan with them	<input type="checkbox"/>
13.	Be proud.... you helped someone today	<input type="checkbox"/>