



Are You Ready for Year-End Benefit Season?

A self-audit for practice owners and treatment coordinators

Every December 31st, millions of dollars in unused dental benefits expire. The practices that end the year strong aren't doing anything complicated — they're simply communicating better and earlier. Use this checklist to find the gaps in your current approach before the window closes.

Your Patient Outreach System

■ You know which patients have remaining benefits before year-end.

This requires pulling a report from your PMS — not guessing.

■ You have a process to reach patients with remaining benefits by early November.

Waiting until December leaves too little time to schedule.

■ Your team has a script or template for the 'you have benefits remaining' conversation.

Winging it leads to inconsistent messaging and missed opportunities.

■ You send at least two reminder touchpoints — not just one.

One message gets ignored. Two creates enough urgency without being pushy.

■ You offer flexible scheduling (evenings or weekends) for year-end appointments.

The holidays are the most common reason patients say they're too busy.

Patients Who've Hit Their Annual Maximum

■ Your team knows how to reframe the 'I've hit my max' conversation.

Maxed-out patients still receive your contracted rate — that's still a discount.

■ You proactively reach out to maxed-out patients rather than waiting for them to call.

■ Your front desk can explain the difference between annual max and contracted rate clearly.

Uninsured Patients & In-Office Plans

■ You have an in-office savings plan available for uninsured patients.



■ **Your team mentions the savings plan proactively — not only when asked.**

Most patients don't know it exists unless someone brings it up.

■ **Patients who've hit their max are offered the savings plan for ongoing care.**

Your Templates & Communication Tools

■ **You have a written patient letter template for remaining benefits.**

■ **You have an email template ready to send — not written from scratch each time.**

■ **You have an SMS template under 160 characters that your team can send directly.**

■ **Your team has a live-answer call script for the 'you have benefits' outreach call.**

■ **You have a voicemail version of the call script for when patients don't pick up.**

■ **You have social media captions ready to post in November and December.**

How many did you
check?

0 — 1 — 2 — 3 — 4 — 5 — 6 — 7 — 8 — 9 — 10

10–11

You've got a solid system in place. Focus on execution and timing.

6–9

Good foundation — a few gaps to close before November hits.

0–5

Real opportunity here. Your patients likely don't know what they're leaving behind.



Which one of these gaps, if closed, would have the biggest impact on your December schedule right now?

Based on the DSN article by Sydney Robinson, Executive Director of Operations, Dental Success Companies.