

Step 1: Finish Set Up

Now that you're up and running, please make sure to visit the Settings tab and review the below settings areas to keep your practice looking its best and running optimally. If you're not sure about how to set something up, please watch a video tutorial ([video tutorial](#) ) available for each tab or contact support for assistance.

- 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.
- LOGO & WEB APPEARANCE:** See if you want to choose a different banner from our library or upload your own. This banner will be displayed at the top of your emails as well as on your patient portal.
- SOCIAL MEDIA LINKS:** Add links to your social media pages to display on your Microsite and on your emails. Install the appointment requests and reviews "Facebook Apps" to further integrate with social media.
- WEB LINKS, WEBSITE WIDGETS:** These settings areas let you integrate RevenueWell with your existing website. Doing this will let you stream your patient reviews to your website and can even allow patients to request appointments with you without leaving your website.
- APPOINTMENT CONFIRMATIONS:** You have probably already set up settings for this area during your training call. Please continue monitoring how your patients react to automatic confirmations; you can make adjustments to the automatic process at any time. Please contact support if you have any questions or need recommendations in this area.
- DIRECT MAIL SETTINGS:** Create a monthly budget for various direct mail communications to send out.
- PATIENT FEEDBACK:** Determine the "Reviews vs. Surveys" frequency for thank you letters. Also, choose to allow patients to submit reviews directly to search engines or not. To increase your office's web presence as a whole, set the slider bar towards more reviews and set "Public Reviews" to "Yes".
- PHONE & TEXT MESSAGE SETTINGS:** Carefully consider setting "Text Messages Enrollment" to "No" to greatly increase your return on appointment confirmation responses from your patients. This will change the RevenueWell model to not ask patients for permission to be texted. Patients can always be unenrolled from receiving text messages in their RevenueWell patient profile.
- REFERRAL MESSAGE:** Consider adding a coupon/promotion to the referral message.
- USER MANAGEMENT:** If more than one staff member will be accessing RevenueWell, please set up additional users by clicking the "Add a new user" link. Please note that a new user's email cannot match the email address of another user or of a patient of the practice.

Step 2: Activate Automatic Campaigns

Automatic communications like recalls, patient reactivation and post-op instructions help bring patients back into your office, keep them healthy, and create an amazing, high-touch patient experience that has them referring their family and friends. Besides reducing the amount of manual work you have to do, they can also save you money in printing and postage — since RevenueWell can be set up to only send physical mailings to people without email addresses.

- BIRTHDAY CARDS:** Automatically sends patients congratulatory emails and postcards on the day of their birthday. Physical cards are sent several days before the day to arrive just on time. Several templates are available for you to choose from.
- EXPIRING INSURANCE BENEFITS REMINDER:** Reminds patients to “use or lose” the remaining insurance benefits at the end of their insurance year. RevenueWell recognizes the benefits end date from your practice management software to send these reminders right on time.
- 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. You can set up a schedule of up to 3 different attempts to try different approaches with patients who don’t comply.
- POST-OP INSTRUCTIONS:** Send patients automatic email post-op instructions after they complete certain services at your office. For this feature to work, please walk the patient out in your practice software immediately after the appointment.
- RECALLS:** 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 to remind them to schedule their appointment. Up to 5 attempts and a variety of templates are available for you to choose from.
- 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. This will let you choose a treatment plan to follow-up on when you have several outstanding treatment plans for the patient. It will not follow-up on referred or rejected treatment plans.
- 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! For this feature to work, you must create a patient account in your practice management software before their first appointment.

Step 3: Send Out Custom Campaigns

Custom campaigns are a great way to reach out to your patient base with educational newsletters, promotions or specials on elective services. RevenueWell has a large library of prebuilt campaigns ready to go — and an intuitive way for you to create your own. Here's a sample of what your next 6 months of campaigns could look like:

	Campaign Category	Campaign	Recommended Settings	Goal
Month 1	Newsletter	Monthly newsletter— Adult	Age 16-99 Send options Exclude patients who received another custom campaign from you in the last 2 weeks	Educate patients
	Newsletter	Monthly newsletter— Pediatric	Age 0-16	Educate patients
Month 2	Patient Reactivation	Little birdie told us	Appointment Unscheduled patients who haven't been in for 24 months Age 16-99 Send Options Only send 1 mailing per household	Reactivate lost patients—adult
	Patient Reactivation	We've missed you— Pediatric	Appointment Unscheduled patients who haven't been in for 24 months Age 0-16 Send Options Only send 1 mailing per household	Reactivate lost patients—pediatric
	Referral	Referral Campaign 1— Incentive	All patients via email Send options Exclude patients who received another custom campaign from you in the last 2 weeks	Get more referrals
Month 3	Teeth Whitening	Choose branded product or a generic campaign	Age 16-75	Promote elective services
	Newsletter	Monthly Newsletter— Pediatric	Age 0-16	Educate patients

Step 3: Send Out Custom Campaigns 

	Campaign Category	Campaign	Recommended Settings	Goal
Month 4	Restorative	Implants	Existing dental conditions Missing Teeth	Increase treatment acceptance
	Restorative	Crowns	Proposed services Crown codes Send options Exclude patients who received another custom campaign from you in the last 2 weeks	Increase treatment acceptance
	Newsletter	Monthly newsletter—Adult	Age 16-99 Send options Exclude patients who received another custom campaign from you in the last 2 weeks	Educate patients
	Newsletter	Monthly newsletter—Pediatric	Age 0-16 Send options Exclude patients who received another custom campaign from you in the last 2 weeks	Educate patients
Month 5	Patient Reactivation	We've missed you	Appointment Unscheduled patients who haven't been in for 24 months Age 16-99 Send Options Only send 1 mailing per household	Reactivate lost patients—adult
	Patient Reactivation	Your smile is like no other —Pediatric	Appointment Unscheduled patients who haven't been in for 24 months Age 0-16 Send Options Only send 1 mailing per household	Reactivate lost patients—pediatric
	Social media	Join us on Facebook	Send options Exclude patients who received another custom campaign from you in the last 2 weeks	Increase online visibility
Month 6	Financing	Choose financing provider	All patients via email	Increase treatment acceptance

Step 4: Make These Activities a Routine

ASK PATIENTS FOR THEIR EMAILS AND CELL PHONE NUMBERS

Each morning, click on the Appointments tab and print RevenueWell enrollment forms for the day. When patients fill them out, place their new contact information into your practice management software.

CHECK REVENUEWELL HOME TAB (AND YOUR EMAIL) FOR NEW ALERTS

RevenueWell's alert system will help you keep a pulse on your practice and the communications that are happening in the background. RevenueWell will deliver important alerts right into your email inbox.

CALL BACK PATIENTS WHO HAVE REQUESTED A CONTACT FROM APPOINTMENT CONFIRMATIONS

If a patient isn't ready to confirm their appointment, they can request a callback from your office. You will be alerted to this via a home screen (and an email) alert. Respond to these requests as soon as you can.

PROCESS ANY OUTSTANDING ONLINE APPOINTMENT REQUESTS

PROCESS ANY SUBMITTED PAYMENTS

Quick Reference: Processing Appointment Requests

-  For each appointment request, your patient may indicate up to 3 date/time options, in the order of their preference.
-  Check your schedule and place the appointment appropriately. If the "Save the Date" reminder is enabled, an e-mail will be sent out automatically to the patient confirming their appointment date and time. Call the patient to notify them that they have been scheduled.
-  If none of their requested times are available, e-mail or call the patient to schedule a different time.

Quick Reference: Processing Payments

-  On the **Payments** tab, click "Process Payment". This will provide the credit card number for you to **manually process the payment** with your credit card processing solution. When you receive an "approved" or "declined" response from your credit card terminal, select the corresponding action from the dropdown and hit "Submit". RevenueWell will either send the patient a receipt or prompt you for further steps.

Step 5: Understand Appointment Communication Statuses

Understanding how to read reminder message statuses on the Appointments tab will help you avoid making unnecessary confirmation calls yourself — or letting patients go unconfirmed.

SMS Icon	What it means	What you need to know/do
 Sent	Text message was sent to patient	Call the patient to confirm the appointment.
 Confirmed	Patient confirmed the appointment	No action
 Asked for callback	Patient asked to be contacted about appointment	Call the patient.
 Multiple Appointments	Text message was not sent because patient has another appointment earlier in the day and RW already sent a message for that earlier appointment.	If appointment status is Confirmed – No action If appointment status is Unconfirmed – consider calling the patient the confirm their appointment
 SMS Too Long	Text message was not sent because message exceeded 160 character limit	Go to Settings / Appointment Confirmations and shorten the practice name for the Advance Reminder, Second Reminder, and Same Day Reminder communications.
Email Icon		
 Sent	Email was sent but not read by the patient	Call the patient to confirm the appointment.
 Read	Email was read by patient, but the patient did not confirm or ask for a callback.	Call the patient to confirm the appointment.
 Confirmed	Patient confirmed the appointment	No action.
 Check email address	Email to the patient bounced, which may be because the email is wrong	Call the patient to confirm the appointment. Confirm the email address on file with the patient and make any appropriate corrections.
 Asked for Callback	Patient asked to be contacted about appointment	Call the patient to confirm the appointment.
 Multiple Appointments	Email was not sent because patient has another appointment earlier in the day and RW already sent a message for that earlier appointment.	If appointment status is Confirmed – No action If appointment status is Unconfirmed – Call the patient to confirm their appointment
Phone Icons		
 Sent	Call was placed to the patient but the patient didn't make a selection (like confirm or ask for callback)	Call the patient to confirm the appointment.
 Left Message	Voicemail was left for the patient	Call the patient to confirm the appointment.
 No answer	Call was placed, but it either a) Rang and never got an answering machine, b) Got a busy signal, c) Got a fax machine. For Advance and Second Reminders, this will cause RW to redial the patient in 24 hours. If the appointment was confirmed before that redial attempt, then the redial is skipped.	If 24 hours redial is not good enough in this case, Call the patient to confirm the appointment. If a redial within 24 hours is acceptable, consider waiting and checking result in 24 hours.
 Confirmed	Patient confirmed the appointment	No action.
 Check Phone Number	RW got an operator intercept message saying this number is no longer in service.	Call the patient to confirm the appointment if you have an alternate number.
 Asked for callback	Patient asked to be contacted about appointment	Call the patient to confirm the appointment.
 Multiple appointments	Call was not placed because patient has another appointment earlier in the day and RW already called for that earlier appointment.	If appointment status is Confirmed – No action If appointment status is Unconfirmed – Call the patient to confirm their appointment