



Appendix C: Checklist and Considerations for Your In-Office Dental Plan

Use this checklist to help determine all of the key steps necessary to consider before you implement your own in-office dental plan.

Addressing these items is a good way to begin the development of your plan.

- Consult your own attorney to determine how the implementation of this plan will affect your business is an important initial step.
- Send a promotional letter to patients without dental benefits.
- Determine the effective date for implementation of your new plan.
- Check with your state to determine if it considers these types of plans to be insurance and make sure that your plan is compliant with any state law.
- Review all your signed managed care agreements to determine if any clauses may affect your in-office plan, e.g., most favored nation clauses.
- Determine the annual fees, percentage discounts and covered procedures.
- Have your attorney review your plan and the accompanying patient agreement.
- Start marketing your plan to the public and your uninsured patients. You may want to consider using social media or local radio and television advertisements as well as direct mail. You may also want to contact your local Chamber of Commerce for additional promotional opportunities.