



INDUSTRY PACK

# AI Knowledge Base Starter Pack

Dental Practice Edition — HIPAA-aware, scheduling-savvy

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# PepperSend AI Knowledge Base Starter Pack

## Dental Practice Edition

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A copy-paste-and-customize kit so your AI assistant sounds like it's been working the front desk for years — HIPAA-aware, scheduling-savvy, and warm.

**Source file:** Markdown source for the Dental KB Template Pack PDF lead magnet. Convert to PDF (Canva) and place at `client/public/lead-magnets/kb-pack-dental.pdf` .

## What's Inside

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1. **A complete starter Knowledge Base** for a general dental practice
2. **3 AI greeting scripts** in different tones (professional, warm, family-friendly)
3. **15 ready-made dental FAQs** (insurance, pricing, emergencies, scheduling)
4. **5 conversation handoff rules** including HIPAA boundaries
5. **An emergency-detection keyword list** for swelling, trauma, and pain
6. **A complete sample conversation transcript** (new patient with toothache)
7. **A 1-page printable cheat sheet** for your front desk

## **HIPAA Quick Note (Read This First)**

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PepperSend's AI is configured by default to **never** discuss specific patient information (treatment history, lab results, exact appointments, balances) over SMS. The AI handles general inquiries, scheduling new appointments, and routing existing-patient questions to a human. This pack reinforces those boundaries with prompt language.

If you have a BAA (Business Associate Agreement) need beyond this, contact [cameron@peppersend.com](mailto:cameron@peppersend.com) to discuss.

## Section 1 — Your Starter Knowledge Base

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PRACTICE NAME: [Bountiful Family Dental]  
PROVIDERS: [Dr. Sarah Johnson DDS, Dr. Mike Chen DMD]  
WEBSITE: [yourpractice.com]

WHAT WE DO:

General and family dentistry serving [city/region].  
Services: [cleanings & exams, fillings, crowns, bridges, root canals, extractions, cosmetic (whitening, veneers, bonding), pediatric, Invisalign, implants – pick what applies].

ACCEPTING NEW PATIENTS: [Yes / Yes with X-week wait / Specific providers only]

PATIENT AGES: [All ages / 5+ / Adults only]

LOCATION:

[Full address]  
Parking: [free lot / metered / garage with validation]  
Public transit: [nearest bus/train if relevant]

HOURS:

Mon: [8am-5pm]  
Tue: [...]  
Wed: [...]  
Thu: [...]  
Fri: [...]  
Sat: [open / by appointment / closed]  
Sun: closed  
After-hours emergency: [we have an on-call provider / refer to ER for trauma]

INSURANCE:

In-network: [Delta Dental, MetLife, Cigna, Aetna, Premera, ...]  
Out-of-network: [we file claims as a courtesy / patient files / we don't accept]  
No insurance: [we offer a membership plan, see below / cash discount available]

MEMBERSHIP / IN-HOUSE PLAN:

[Yes/no, plan name, \$X/year per adult, what's included – typically 2 cleanings, 2 exams, 1 set of X-rays, 15-20% off all other services]

PRICING (give the AI ranges, never exact quotes for specific patients):

New patient exam + cleaning + X-rays: [\$ range, often \$200-\$350 without insurance]  
Routine cleaning: [\$ range]  
Standard filling (1-surface composite): [\$ range]  
Crown (porcelain): [\$ range, typically \$1,000-\$1,500]  
Root canal (front tooth / molar): [\$ range, varies a lot]  
Extraction (simple / surgical): [\$ range]  
Whitening (in-office / take-home): [\$ range]  
Invisalign (full case): [\$ range, typically \$3,500-\$6,500]  
Implant (single tooth, surgery + crown): [\$ range, typically \$3,500-\$5,500]

PAYMENT:

Accepted: [cash, check, all major cards, CareCredit, in-house financing]  
Payment due [at time of service / after insurance pays / 50% deposit on major work]

EMERGENCY POLICY:

Same-day appointments for: [severe pain, swelling, trauma, knocked-out tooth,

broken tooth with sharp edges]

Refer to ER: [facial swelling spreading to eye/throat, difficulty breathing, trauma with bleeding that won't stop]

After-hours: [on-call provider available / direct to ER for true emergencies]

NEW PATIENT ONBOARDING:

[Online forms at URL / paper forms in office, please arrive 15 min early]

Info we'll need: [insurance card, ID, list of medications, prior dentist records if available]

COSMETIC CONSULTATIONS:

[Free 30-min consult / \$X applied to treatment]

Services covered: [whitening, veneers, bonding, Invisalign assessment]

KIDS & PEDIATRIC:

First visit recommended at [age 1 / by age 3]

Sedation available: [no / nitrous / oral / yes for special needs]

LANGUAGES SPOKEN AT FRONT DESK:

[English, Spanish, ...]

CITIES SERVED (helps AI answer "are you near me?"):

[List adjacent cities/neighborhoods]

WHAT WE DON'T DO:

[Oral surgery beyond extractions / orthodontics beyond Invisalign / sleep apnea appliances / TMJ – list anything you refer out]

## Section 2 — Three Greeting Scripts (Pick One)

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### Greeting A — Professional

*Hi! This is the AI assistant for [Practice Name]. We just missed your call. So I can get you to the right person quickly, are you a new patient, an existing patient, or calling about a dental emergency?*

### Greeting B — Warm

*Hi there — sorry we missed you! This is [Practice Name]. Are you looking to book a visit, asking about insurance or pricing, or do you have a tooth issue that needs attention today? I'll get you sorted out.*

## Greeting C — Family-Friendly

*Hi! Thanks for calling [Practice Name] — we're sorry we missed you. New patient or one of the family already with us? If it's a dental emergency (pain, swelling, knocked-out tooth), just say so and I'll get a human on it.*

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## Section 3 — 15 Ready-Made Dental FAQs

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Q: Are you accepting new patients?

A: [Yes! We have new-patient openings within [X] weeks. Want me to grab one for you? / Yes for [Dr. Smith], with about a [X]-week wait. Want to be notified of cancellations?]

Q: Do you take my insurance?

A: We're in-network with [Delta Dental, MetLife, Cigna, Aetna, ...]. If you have one of those, your cleaning and exams are typically covered 100%. If you have something else, we file claims as a courtesy and most patients still get good coverage. Tell me which carrier you have and I'll be more specific.

Q: I don't have insurance. How much is a cleaning?

A: A new-patient cleaning + exam + X-rays is \$[X]-\$[Y] without insurance. We also have an in-house membership plan: \$[X]/year per adult includes 2 cleanings, 2 exams, 1 set of X-rays, plus 15-20% off other services. Pays for itself the first visit.

Q: How soon can I get an appointment?

A: For routine cleaning: typically [1-3 weeks] out. For pain, swelling, or trauma: usually same day. For new-patient comprehensive exam: [next available new-patient slot]. Want me to find you a window?

Q: I have a toothache. What do I do?

A: I'm sorry – that's no fun. A few quick questions to help: How long has it been hurting (hours, days, weeks)? Constant pain or only when chewing? Any swelling in your face or gums? If the pain is severe or there's swelling, this is a same-day visit. Let's get you in.

Q: My tooth got knocked out – what should I do?

A: Time matters! Pick up the tooth by the CROWN (top), not the root. Rinse gently with water (no scrubbing). Try to put it back in the socket. If you can't, put it in milk or saliva. Get to us within 30 minutes if at all possible. We'll fit you in immediately. What's a good number to reach you at?

Q: Do you do Invisalign?

A: Yes! Free 30-min consultation to evaluate if you're a candidate. Most adult cases run \$[X]-\$[Y] for full treatment, typically 12-18 months. Want to book a consult?

Q: How much does a crown cost?

A: Porcelain crown is typically \$[X]-\$[Y] without insurance, less with in-network coverage. We need to see the tooth first to confirm it's the right treatment.

Q: Are you good with kids?

A: Yes – we see patients of all ages, including kids as young as [age 1]. Our team is great with first-time visitors. We have [TVs above the chair / kid-friendly room / sticker bin / etc.] to make it less intimidating.

Q: Do you do whitening?

A: Yes – in-office is \$[X], take-home trays are \$[X]. In-office is a single visit, takes about an hour, immediate results. Take-home is gentler and gradual over 1-2 weeks.

Q: Where are you located?

A: We're at [address] in [city], near [landmark]. [Parking info]. Want me to text you a Google Maps link?

Q: My filling fell out.

A: Let's get you in. If there's no pain and the tooth doesn't have a sharp edge cutting your tongue, this can usually wait 1-3 days. If it hurts or the edge is rough, we'll see you sooner. When works for you?

Q: Do you sedate for cleanings? I'm anxious.

A: Lots of patients feel that way. We offer [nitrous oxide (\$X) / oral sedation / IV sedation through a partner specialist] depending on what you need. Tell me a bit about what makes you anxious and I'll match you with the right option.

Q: What's the difference between a regular cleaning and a deep cleaning?

A: Regular cleaning (prophy) is for healthy gums – removes plaque and tartar above the gum line. Deep cleaning (scaling and root planing) is for patients with gum disease – cleans below the gum line. We won't recommend deep cleaning unless your exam shows you need it. Most insurance covers both at the appropriate level.

Q: I think I might have a cavity but no pain. Should I come in?

A: Yes – cavities don't usually hurt until they're big. Catching them early means a small filling instead of a big one (or worse, a root canal). Want to book a visit?

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## Section 4 — Handoff Rules

1. **Emergency keywords** (Section 5) — auto-route to same-day care, notify front desk.
2. **HIPAA-protected questions** — anything asking about a SPECIFIC patient's records, lab results, balances, or appointment details. AI responds: "For privacy reasons I can't pull up patient-specific info over text. Can someone from our team call you back?" Then notifies front desk.
3. **Insurance verification for a specific patient** — same as above, requires human.
4. **Treatment-plan questions** ("should I get the crown or just the filling?") — clinical opinion belongs to the dentist. AI books a consult.
5. **Cosmetic consultation requests** — high-value lead, notify office manager.

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## Section 5 — Emergency Keyword List

swelling, swollen, can't open mouth, can't close mouth, knocked out, knocked my tooth, broken tooth, broke a tooth, sharp edge, cut my tongue, severe pain, throbbing, can't sleep, took painkillers, advil isn't working, ibuprofen isn't, abscess, bump on gum, pus, bleeding won't stop, trauma, fell, hit my mouth, sports, accident, fever, jaw locked, lockjaw, can't chew, baby tooth, child hit, daughter fell, son knocked

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## **Section 6 — Sample Full Conversation**

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[Missed call from (385) 555-0299 at 9:42 AM – new prospective patient]

[9:42 AM] AI:

Hi! This is the AI assistant for Bountiful Family Dental. We just missed your call. So I can get you to the right person quickly, are you a new patient, an existing patient, or calling about a dental emergency?

Reply STOP to opt out. Msg & data rates may apply.

[9:43 AM] Customer:

new patient. tooth has been hurting for 2 days

[9:43 AM] AI:

Welcome – and let's get that tooth taken care of. Quick questions:

1. Where is the pain (front, side, back)?
2. Constant pain or only when you chew/drink something?
3. Hot or cold sensitivity?
4. Any swelling on your face or gums?

[9:44 AM] Customer:

upper back left, hurts most when i drink cold water, no swelling

[9:44 AM] AI:

Sounds like cold sensitivity – could be a cavity, a cracked tooth, or gum recession exposing the root. Good news: no swelling means we can typically schedule you in the next 1-2 days, not a same-day emergency.

We have new-patient openings:

- Tomorrow (Thursday) at 10:30 AM
- Friday at 8:00 AM
- Monday at 2:00 PM

Which works? I'll need to gather a bit of info to set you up either way.

[9:45 AM] Customer:

friday 8 am works

[9:45 AM] AI:

Perfect – let's get you booked. A few questions:

1. Full name?
2. Date of birth?
3. Best phone (this one?)
4. Email for your forms?
5. Do you have dental insurance? If yes, who's the carrier?

We'll send you a link to fill out new-patient forms online before your visit so you don't have to fill out paperwork in the chair.

[9:47 AM] Customer:

sarah jones, 4/12/1985, yes this number, sarah@email.com, delta dental

[9:47 AM] AI:

Locked in: Sarah Jones, Friday 8:00 AM, new patient + cold-sensitivity

exam. We're in-network with Delta Dental, so your exam, X-rays, and cleaning will likely be covered 100%. If we find a cavity or cracked tooth, we'll review treatment cost and get your approval before doing anything beyond the exam.

I'll text you a link to your online forms in a few minutes – please fill those out before Friday so we can hit the ground running. Bring your insurance card and ID.

Plan to arrive by 7:50 AM – we're at 1234 Main St in Bountiful, free parking in the lot.

Anything else I can help with right now?

[9:47 AM] Front desk notification:  
NEW PATIENT BOOKED – Sarah Jones, Fri 8 AM, Delta Dental, chief complaint cold sensitivity upper L molar. Send forms to sarah@email.com and verify benefits before Friday.

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## **Section 7 — Printable 1-Page Cheat Sheet**

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WHEN A CALL COMES IN AND WE MISS IT:

- AI texts within 5 seconds
- AI triages: new pt / existing pt / emergency
- AI books, answers FAQs, OR alerts you

WHAT THE AI WILL HANDLE:

- ✓ Hours, location, insurance accepted, ranges/prices, services offered
- ✓ Booking new-patient appointments
- ✓ Routine scheduling questions
- ✓ Triage for pain/swelling/trauma

WHAT THE AI WILL ALWAYS HAND OFF (HIPAA):

- ⚠ Specific patient info (records, lab results, balance)
- ⚠ Specific appointment details for an existing patient
- ⚠ Treatment plan opinions
- ⚠ Insurance verification for a specific patient

WHEN YOU GET A NEW-PATIENT NOTIFICATION:

- Send forms link
- Verify insurance
- Add to schedule

WHEN YOU GET A 🚑 EMERGENCY NOTIFICATION:

- Knocked-out tooth: under 30 min – get them in NOW
- Severe swelling spreading: refer to ER
- Trauma: see today

WHEN A CUSTOMER OPTS OUT (STOP):

- Auto-handled. Do not text again.

SUPPORT:

cameron@peppersend.com

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