TABLE OF CONTENTS

1 **Coupon Code Cheat Sheet**
Detailed breakdown of coupon codes based on the patient's treatment phase.

2 **Steps to Succeed**
Guidelines for successfully presenting Retainers For Life to your patients.

3 **Enrolling Your Patient in Retainers For Life During the NP Exam**
Step-by-step instructions for enrolling new patients in Retainers For Life at the beginning of treatment.

4 **Enrolling Your Patient in Retainers For Life During Active Treatment**
Step-by-step instructions for enrolling patients in Retainers For Life during active treatment and which appointments to discuss RFL for the ideal time to enroll.

5 **Enrolling Your Patient in Retainers For Life During Retention**
Step-by-step instructions for enrolling patients in Retainers For Life during the retention phase.

6 **Front Desk Scripting**
Sample scripts for administrative staff handling phone inquiries, especially for retention patients.

7 **Clinic Scripting**
Scripts for clinical assistants presenting Retainers For Life to patients in treatment.

8 **New Patient Scripting**
Guidance and examples for treatment coordinators presenting Retainers For Life in the new patient exam.

9-11 **User Guide**
Breakdown of dashboard and marketing pages.

12 **Practice Specific Links**
Designated practice links

13-15 **FAQs**
Answers to common questions that may arise during the enrollment process.

PROTECTION PLAN PRICING

30% OFF RETAIL

CRO_ _RET (your initials)	PAYMENT IN FULL	END OF TREATMENT PAYMENT PLAN
UPPER & LOWER	~~$1250~~ $880	6 months of $153.33
ONE ARCH ONLY	~~$625~~ $440	3 months of $153.33

- For patients who are enrolling provide your discount code (above) to give them access to the discounted rate
- $20 service fee per arch is applied to all payment plans

PROTECTION PLAN PRICING
FOR NEW PATIENTS

30% OFF RETAIL

CRO_ _NPRET (your initials)	PAYMENT IN FULL	END OF TREATMENT PAYMENT PLAN
UPPER & LOWER	~~$1250~~ $880	$880/x months
ONE ARCH ONLY	~~$625~~ $440	$440/x months

- For patients who are enrolling provide your discount code (above) to give them access to the discounted rate
- For patients enrolling in the New Patient Exam, Retainers For Life will match your patients treatment payment plan with no added interest

STEPS TO SUCCESS

1

Educate your patient on the program and send the link
a) Discuss wear and care & reasons why you would need to replace
b) Discuss In House cost and protocol VS Retainers for Life
c) Send patient with information

2

In 1 week follow up with your patient to see if they have any questions,
or need any assistance with enrollment.

3

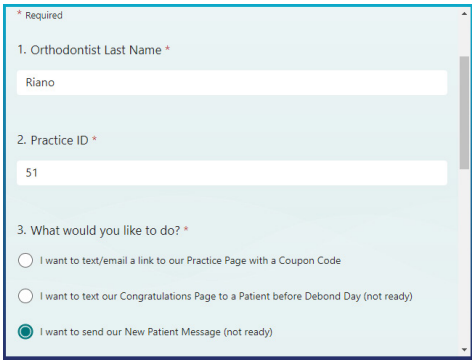
If your patient has not signed up at the time of the next appointment,
offer to enroll them in office.

ENROLLING YOUR PATIENT IN RETAINERS FOR LIFE

AT THE BEGINING OF TREATMENT

1 Before your NP Exam

Be sure to send your patient the Welcome Message using the Patient Communication form on your Dashboard. Even if your patient does not enroll at the NP exam, when they hear about it at the end of treatment they are more likely to enroll.



2 Discuss RFL as a treatment upgrade option

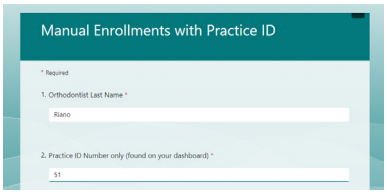
As your doctor wraps up the new patient exam, it is important he/she recommends RFL:

"Most of our patient's sign up for Retainers for life because it's the best way to protect your investment. It's not if but when you'll need a replacement, and this replacement program is the most convenient and affordable way to replace them. Signing up now gives you access to the lowest monthly payment available and locks you in at this price. Instead of paying $X amount for each replacement in the office, you'll be able to order them online for only $43 and ship them straight to your house! "

Even if your patient does not enroll at the NP exam, when they hear about it at the end of treatment they are more likely to enroll.

3 Enroll your patient through the Manual Enrollments form on your dashboard

Feel free to utilize the RFL NP Paper Contract while reviewng NP Paperwork to go over RFL with your patient during their exam. If your patient would like to enroll, submit your patient's information to the Manual Enrollment form using the coupon code CRO_ _NPRET. Let your patient know that the payment for RFL will be separate from their treatment, similar to a third party insurance for a plane ticket. Be sure to choose the option "No, I will order the Retainer seperately on Scan Day" on the questions that asks "Is a Retainer Order Needed Now or In the Future?".



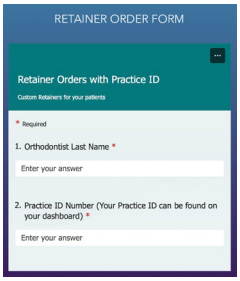
4 Update your patient's status to RFL Member in your charting software

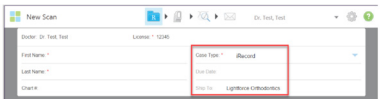
This will make sure your team knows that this patient's debond retainer is free for the practice with thier membership.

5 At the Debond Appointment

For all RFL members, send your patient's scan to the RFL Lab directly from your iTero. Submit a Retainer Order through the RFL Dashboard for their backup retainer to be delivered to their home. Send your patient home with an RFL Patient Giftbag.

* If your patient has puffy gums at the Debond appointment, submit your patient's scan and retainer order at the 1st retainer check with your doctor's approval.





ENROLLING YOUR PATIENT IN RETAINERS FOR LIFE

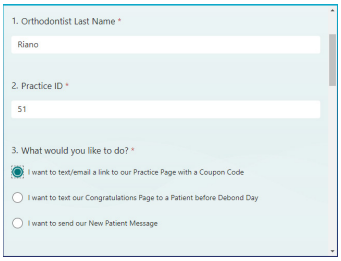
DURING ACTIVE TREATMENT

1 At the Check For Debond appointment discuss RFL

Remind your patient that while they are in active treatment, they are able to enroll in Retainers For Life at a discounted rate with payment plan options. Discuss the importance of wearing their retainer and how often they may need to replace them. Talk to your patient about RFL as an affordable and convenient solution for replacement retainers in the future. Let your patient know that its not if but WHEN they'll need replacements, and with Retainers For Life they can replace their retainers at wholesale cost and have them shipped straight to them. Give your patient the RFL puppy post card and Retainer Options form.

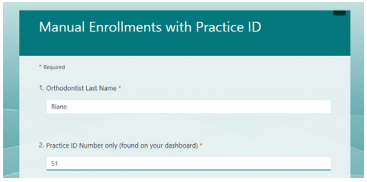
2 Send your patient the RFL Text

If your patient needs time to think about enrolling, use the Patient Communication form on your dashboard to send your patient a text with a link to enroll with your coupon code (CRO_ _RET). This allows your patient to enroll at the comfort of their own home from the text link.



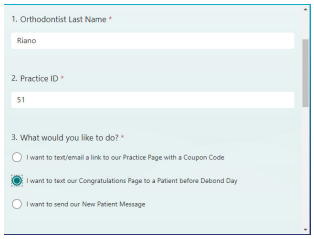
3 From the text link your patient can enroll online using your coupon code OR In office

If your patient enrolls in office, use the back of the Retainer Options form to collect their information and transfer their info to the Manual Enrollment submission on the dashboard. Be sure to choose the option "No, I will order the Retainer seperately on Scan Day" on the question that asks "Is a Retainer Order Needed Now or In the Future?" if your patient has not be debonded yet. Update your patient's status in their chart as RFL member.



4 The week before your patient's Debond appointment

There will be a designated person to use the Patient Communication form to send the congrats message to your patient before debond.



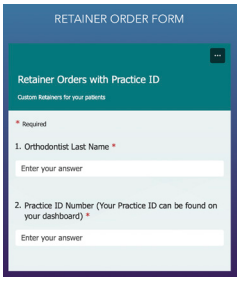
5 At the Debond Appointment

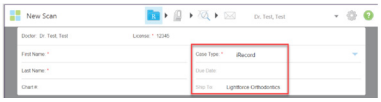
Remind your patient that they can still enroll with 30% off of RFL. After the patient's braces/attachments have been removed, give all RFL members the RFL patient giftbag and review wear and care of retainers.

6 Submit the Retainer Order

On Debond day for all RFL members, send your patient's scan to the RFL Lab directly from your iTero. Submit a Retainer Order through the RFL Dashboard for their backup retainer to be delivered to their home.

* If your patient has puffy gums at the Debond appointment, submit your patient's scan and retainer order at the 1st retainer check with your doctor's approval.





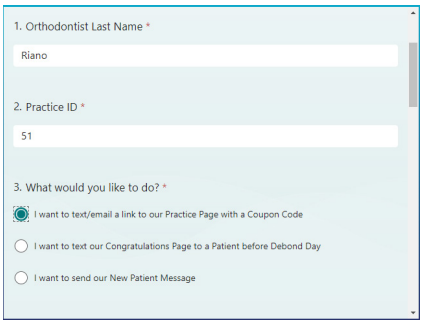
ENROLLING YOUR PATIENT IN RETAINERS FOR LIFE

DURING RETENTION

1 Present cost of one replacement retainer vs RFL

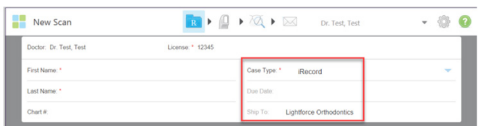
"You can get replacement retainers for $XXX amount today, or you can sign up for our lifetime replacement program for for $440 per arch and it includes your first retainer(s) - this is the best way to protect your investment for the most affordable and convenient replacement retainers in the future"

2 Send patient text using the "Patient Communication" form on your dashboard



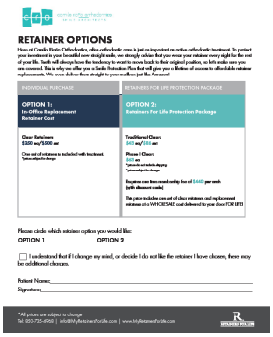
3 Check for and submit the scan to RFL

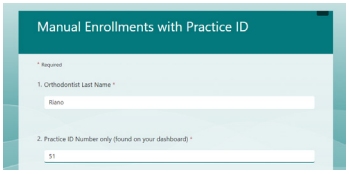
If there is no scan on file, schedule the patient for a scan and send to RFL lab



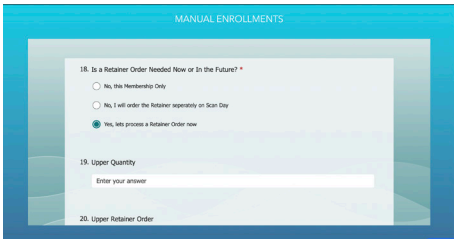
4 From the text link your patient can enroll online using your coupon code OR In office

If your patient enrolls in office, use the Retainer Options paper form to collect their information and transfer their info to the Manual Enrollment submission on the dashboard.





5 Don't forget to include a retainer order with the membership if you are enrolling in-office. Do this by selecting "Yes, Let's process a retainer order now" on the Manual Enrollment Form. The included retainer can be shipped to the patient's home for convenience



FRONT DESK SCRIPTING SAMPLES

Lost Retainer Phone Call:

"Sure, I would be happy to get you a new set of retainers! To go over your options; we can replace your existing set for $X per retainer. That is a total of $XX for a full set. Or we have partnered with Retainers for life where you pay a one-time membership fee of $440 per arch including the retainer and have access to wholesale replacement retainers at a fraction of the price for the rest of your life mailed to your door. Payment plans are available if needed. This membership pays for itself by the second use!"

Handing out the Puppy Postcard:

"Hey! Have you heard about our newest retainer program? It's called Retainers for Life, and it gives you access to wholesale replacement retainers at a fraction of the price for the rest of your life, mailed to your door from easy online ordering! Here is a postcard with some additional information about it! I can send you a text message with my coupon code to give you, my discount"

CLINIC SCRIPTING SAMPLES

In Treatment - Pre Debond:

"You are about to get your braces off!! Congratulations!! Here's some information that tells you a bit more about our Lifetime retention program, as well as all of the reasons that you will need to replace your retainer. I can send you a text with a link for more information and my coupon code to save you some additional money!"

"Now that you're coming to the end of treatment, we have a replacement program called Retainers for Life. We recommend Retainers for Life because it's the best way to protect your investment. It's not if but when you'll need a replacement, and this replacement program is the most convenient and affordable way to replace them. We also have a 6-month payment available for this program!"

Handing out the Puppy Postcard:

"Hey! Have you heard about our newest retainer program? It's called Retainers for Life, and it gives you access to wholesale replacement retainers at a fraction of the price for the rest of your life, mailed to your door from easy online ordering! Here is a postcard with some additional information about it! I can send you a text message with my coupon code to give you, my discount"

Patient has lost a retainer chairside:

"Sure, I would be happy to get you a new set of retainers! If you have a few moments, I would love to go over your options. We can replace your existing set for $XX per retainer. That is a total of $XXX for a full set. Or we have partnered with Retainers for life where you pay a one-time membership fee of $440 per arch including the retainer and have access to wholesale replacement retainers at a fraction of the price for the rest of your life mailed to your door. Payment plans are available if needed. This membership pays for itself by the second use!"

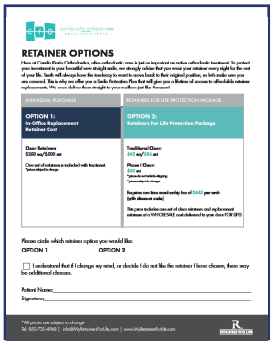
NEW PATIENT CONSULT SCRIPTING SAMPLES

In Consult:

"Now that you are beginning treatment with Dr. ___, we want you to know how very important retainer wear is to protect the smile that you are investing in. Retainer wear is lifetime as your teeth will always want to move back. That is why Dr. ___ has partnered with Retainers for Life. This program offers you access to affordable replacements for the rest of your life at wholesale price for a one-time membership fee of $440 per arch, and they even deliver straight to your door just like amazon! For example, right now replacement retainers cost $XXX each in our office, but with Retainers For Life the co-pay would only be as low as $43. If you would like to sign up today, we can lock in the $440 per arch membership cost and finance the payments for as long as your treatment length.

"Most of our patients sign up for Retainers for life because it's the best way to protect your investment. It's not if but when you'll need a replacement, and this replacement program is the most convenient and affordable way to replace them. Signing up now gives you access to the lowest monthly payment available and locks you in at this price."

Paper Marketing Forms



RETAINER OPTIONS SHEET

USAGE: Present during discussions about Retainers For Life.

DETAILS:

- Provides guidelines on replacement options: Single and office replacement pricing vs. Retainers For Life pricing.
- Clearly explains the choice between individual purchase and the Retainers For Life protection package.
- Back includes FAQs on retainers and retention.
- Patient enrollment section on the back allows the assistant to input data into the Manual Enrollment Form on the dashboard.
- Ideal for sending home with patients during Retainers For Life discussions.

NEW PATIENT PAYMENT PLAN

USAGE: Quick reference for new patient enrollment before treatment starts.

DETAILS:

- Matches the office's payment plan for new patients.
- Clearly outlines pricing options for enrolling in a single arch or both arches.
- Highlights the absence of interest on the payment plan for new patients who register with Retainers For Life.
- Simplifies the process of aligning the patient's treatment months with the corresponding monthly payment for Retainers For Life.

PUPPY POSTCARD

USAGE: Given to patients deciding on Retainers For Life.

DETAILS:

- A visually engaging, co-branded miniature marketing item.
- Focuses on a concise explanation of how Retainers For Life works if the patient enrolls.
- Designed to be taken home by patients for further consideration.

RETAINERS FOR LIFE DOCTOR BIFOLD

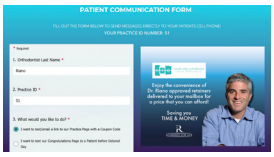
USAGE: Kept in the new patient exam room, waiting room, or clinic.

DETAILS:

- A focused flyer designed to capture patient interest in Retainers For Life.
- Suitable for display in areas where patients might be waiting, encouraging them to learn more.
- Can be taken home by patients to explore the benefits of Retainers For Life.

USER GUIDE CONT.

Dashboard Digital Forms

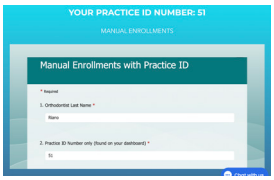


PATIENT COMMUNICATION FORM

USAGE: Used to send emails and text messages directly to your patient.

OPTIONS:

- Sends a link to the practice's landing page with a coupon code, facilitating patient enrollment at a discounted rate. This should be sent anytime your patient is presented with Retainers For Life.
- Sends a personalized congratulations message (before debond) from the doctor, expressing gratitude and providing information on retention.
- Sends a new patient message introducing the practice and what to expect at their upcoming appointment.

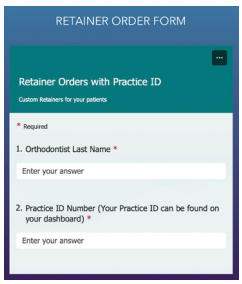


MANUAL ENROLLMENTS WITH PRACTICE ID

USAGE: Registers patients for Retainers For Life.

DETAILS:

- Enrolls your patient in Retainers For Life at anytime during treatment or retention.
- Provides a secure method for inputting patient information for their patient profile and billing at the time of registration.
- Offers the option to attach the patient's retainer order, especially useful if there's a scan on file or if the patient is being scanned on the same day and in need of a retainer right away by selecting "Yes, let's process a retainer order now."
- If your patient has not been scanned and is not in need of a retainer immediately, select the option "No, I will order the retainer separately on scan day." Upon scan day, use the Retainer Order form on the dashboard to claim the included retainer with membership.



RETAINER ORDER FORM

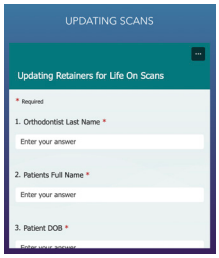
USAGE: Claim your patients retainer that is included with their membership.

DETAILS:

- Allows practices to submit retainer orders from their dashboard to Retainers For Life.
- Ensures a smooth process for ordering the patient's included retainer with membership.
- The form is necessary to order your patient's back-up retainer(s) when they have enrolled in the office or online before being scanned. You must fill out the Retainer Order form and send your patient's scan to the RFL Lab at the Debond OR Retainer Check appointment to ensure your patient's recieves their included retainer(s) with their membership.

USER GUIDE CONT.

UPDATING SCANS FORM



USAGE: Notify Retainers For Life of a new scan to be used for future retainer orders for your patients.

DETAILS:

- Notifies Retainers For Life when a patient has a new scan on file.
- Ensures that the most recent scan is used for any future retainer orders.
- Streamlines the process of managing patient scans, providing efficiency for the practice and accuracy for Retainers For Life.
- Does not order a retainer for your patient.

PRACTICE SPREADSHEET

USAGE: Provides an overview of enrolled patients and practice details.

DETAILS:

- Lists all patients enrolled in Retainers For Life.
- Displays practice shortcuts and links relevant to Retainers For Life.
- Offers easy access to team member coupon codes.
- Logs records of text/email communications sent from the dashboard to patients.
- Quick tip: for efficient patient searches use the "Control F" function on the enrollment tab.

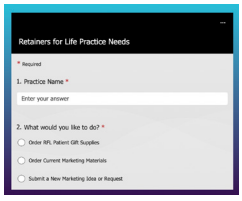
DOCUMENTS

USAGE: Access and print updated paper documents directly from your dashboard.

DETAILS:

- Conveniently provides access to the latest paper documents for easy printing.
- Ensures practices have the most up-to-date materials for patient communication and enrollment.

RETAINERS FOR LIFE PRACTICE NEEDS DIGITAL FORM



USAGE: Order marketing items for patients at no additional charge.

DETAILS:

- Enables practices to order various marketing items, including patient gift supplies and promotional material like the Puppy Postcard or Doctor Bifold.
- Ensures practices have the necessary materials to effectively communicate the benefits of Retainers For Life to their patients.

PRACTICE SPECIFIC LINKS

PRACTICE DASHBOARD:
https://www.RFLDoctors.com/CRODashboard

PRACTICE LANDING PAGE:
https://www.MyRetainersForLife.com/CamiloRianoOrthodontics

CONGRATULATIONS PAGE:
https://www.MyRetainersForLife.com/RianoCongrats

NEW PATIENT LANDING PAGE:
https://www.MyRetainersForLife.com/RianoNewPatient

WHATSAPP:
https://chat.whatsapp.com/LfQtyQ3Ryk3HjZZbtHcr9n

FREQUENTLY ASKED QUESTIONS

HOW DOES RETAINERS FOR LIFE WORK FOR MY PATIENT?

Your patient pays a one-time fee directly to Retainers For Life to become a lifetime member. This membership provides access to wholesale cost retainers. It's a lifetime benefit, not a subscription. Patients order replacements online for a small copay, and we ship them directly to their door.

HOW DOES OUR PRACTICE DISCOUNT WORK?

When your patient enrolls using your practice-specific coupon code, the retail price is discounted to your specified price. The coupon code links the patient to the retainer type they need and connects them to your doctor and team member, ensuring a personalized experience.

HOW DOES THE TEAM BONUS WORK?

Each patient enrollment earns the team a $10 bonus per arch (up to $20 for both arches). The bonus can be split among the team (balloon bonus) or given to the team member whose coupon code was used (individual bonus). Team bonuses are disbursed monthly, and the practice can change the bonus type with 30 days' notice.

HOW DOES THE DOCTOR'S BONUS WORK?

The doctor receives a specified bonus for each enrollment based on their chosen tier, disbursed quarterly after the onboarding fee has been fulfilled. The chosen tier, determining the program's cost and the doctor's bonus, can be adjusted over time to meet the practice's goals.

IS A RETAINER INCLUDED WITH MY PATIENT'S MEMBERSHIP?

Yes, an included retainer is provided. The practice must provide the debond retainer, and the included retainer becomes the patient's secondary retainer, shipped to their house. The included retainer with memership can be claimed at the Debond appointment, or at the Retainer Check appointment if the patient has puffy gums at debond. If you have a retention patient who needs a replacement retainer, their enrollment in Retainers For Life will automatically include a retainer(s) whenever they enroll.

HOW CAN MY PATIENT ENROLL ONLINE?

Patients can enroll online through your practice landing page, which can be shared using the patient communication form on your dashboard.

HOW DOES THE PATIENT ENROLL IN THE OFFICE?

Patients can be registered in the practice by filling out the retainer options paper form, and the assistant can input the information into the manual enrollments form on the dashboard.

FREQUENTLY ASKED QUESTIONS CONT.

HOW DOES THE PATIENT ORDER A RETAINER ONCE THEY ARE A MEMBER?

Patients can follow the email sent during registration, clicking the "Members Order Here" button, or use the following link: https://www.myretainersforlife.com/order-retainers-members-only.html (There is a shipping fee for all retainer replacements.)

WHAT IF MY PATIENT ORDERS A RETAINER AND IT DOESN'T FIT?

During the ordering process, patients are asked about the duration since they last wore their retainers. If it's been over 2 weeks, our customer service team contacts the patient and requests photos to be uploaded directly to RFL. These photos will be evaluated against their scan on file to determine the reason for the ill-fitting retainer. If a patient receives a retainer that doesn't fit, they should contact RFL immediately. If it's deemed an ill-fabricated retainer, it falls under our fit guarantee, and a new one is sent promptly. If a new scan is needed, both the patient and practice are notified. In case of fit issues in the office, follow our Fit Guarantee protocol by documenting the retainer and the patient's teeth with photos. If your patient has had minor shifting (less than 2mm) they may qualify for a Soft Retainer Kit.

IS MY PATIENT CHARGED FOR A RESCAN?

The initial scan for your patient's membership is covered by the membership fee. Retainers For Life suggests refraining from charging patients for scans during the first year of membership. In the event of a necessary new scan, the doctor may, at their discretion, impose a $99 rescan fee through Retainers For Life. This rescan fee will be fully reimbursed to the doctor for their chairtime.

WHAT IS THE SOFT RETAINER KIT?

Our Soft Retainer Kit is designed for patients who have experienced minor shifting (less than 2mm) since their last scan. Crafted from flexible aligner material, the soft retainer offers a comfortable solution to gently guide your patient's teeth back into alignment. To ensure optimal results, the Soft Retainer Kit is exclusively available for purchase through their orthodontist or directly via customer service, subject to doctor approval. The cost of a Soft Retainer Kit is $129.99 (subject to change).

HOW DOES THE SCAN ASSESSMENT WORK?

For each membership/retainer order, our lab logistics team reviews the scan. If a new scan is needed for quality reasons, the team contacts your practice. A well-detailed scan is crucial, and if a patient can't get rescanned, it may impact the fit guarantee.

WILL THE MEMBERSHIP OR RETAINER PRICES INCREASE OVER TIME?

Over time, due to economic fluctuations, prices can increase. However, patients with a lifetime membership will always have access to the lowest wholesale cost retainer. The designated tier and doctor bonus can be adjusted by the doctor.

FREQUENTLY ASKED QUESTIONS CONT.

HOW DOES THE FIT GUARANTEE WORK?

The Fit Guarantee is our commitment to providing patients with a perfectly fitting retainer. After our clinical lab technician customizes the retainer, patients are instructed to try it on immediately. They can scan a QR code for a message from Dr. Amy Jackson, our orthodontist, and report any issues within three days of receipt by calling or texting customer service. This ensures prompt adjustments for the ideal fit, contributing to overall patient satisfaction and the success of our Fit Guarantee. If it's deemed an ill-fabricated retainer, it falls under our fit guarantee, and a new one is sent promptly. If a new scan is needed, both the patient and practice are notified. In case of fit issues in the office, follow our fit guarantee protocol by documenting the retainer and the patient's teeth with photos.

HOW DOES THE PUFFY GUM PROTOCOL WORK?

If a patient's gums are identified as puffy during the scan, it is advisable to document this in the chart and recommend a rescan. In the event of receiving a retainer order with noted puffy gums, the order is processed and dispatched. However, we promptly notify both the practice and the patient, strongly advising a new scan for the subsequent retainer. Should the retainer not fit due to puffy gums, one complimentary remake is allowed following the initial request to the patient/practice for a new scan. For any remakes beyond the first, the patient or the practice is responsible for covering the associated costs.

IS IT POSSIBLE FOR RFL TO DIGITALLY ALIGN THE TEETH BASED ON THE SCAN I PROVIDE FOR MY PATIENT'S RETAINER?

Retainers For Life specializes in retention and doesn't facilitate tooth movement. If your patient requires alignment adjustments, we recommend an in-office aligner treatment. Once the treatment is complete, you can send the final scan to RFL for their ultimate retainer.

HOW CAN I SUBMIT FOR NEW MARKETING MATERIALS?

Use the digital form titled "Retainers For Life Practice Needs" on your dashboard's bottom to submit orders directly to our marketing manager for any needed materials.

AM I REQUIRED TO USE WHATSAPP FOR COMMUNICATION?

WhatsApp is not required but highly recommended for faster communication. For your practice and patient's security and privacy we use WhatsApp because it is end-to-end encrypted If not using WhatsApp, email info@myretainersforlife.com, call customer service at 850-735-4968, or contact your integration specialist for patient-related communication.