

The AI front-desk checklist for dental practices

Last updated October 17, 2026 · Prices and features change, so check the linked sources before you buy.

Use this before, during and after any AI receptionist or AI front-desk demo. It works with any vendor, and nobody paid to be in it.

1. Before you talk to a vendor

- ☐ Pull 2 weeks of phone reports: **unanswered calls by hour and day**. This is your baseline.
- ☐ Write down your top 15 patient questions (insurance accepted, hours, new-patient process, emergencies, cost of a cleaning).
- ☐ List the calls that must **always go to a person**: clinical questions, billing disputes, upset patients, emergencies.
- ☐ Note your PMS and version, your phone provider, and whether you already text patients (e.g. Weave).
- ☐ Decide where you'd start: after-hours only, overflow, or all calls.

2. Twelve questions for the demo

- ☐ Does it **write the appointment into our PMS** during the call, or only create a request?
- ☐ Show it on *our* PMS version. Is that a direct integration or through middleware?
- ☐ Does it respect provider blocks, operatory rules and new-patient appointment lengths? Show me.
- ☐ What happens on a 2 a.m. dental emergency call?
- ☐ How does a patient reach a human, and how fast?
- ☐ Does it tell callers it's an AI? Can we change the greeting?
- ☐ Which languages does it support on our plan?

- ☐ Will you sign a **BAA** before go-live?
- ☐ Who can access recordings and transcripts, and how long are they kept?
- ☐ How is it billed (flat, minutes, credits), and what's the overage rate?
- ☐ Is there a setup fee? What's the contract term? Can we cancel after the pilot?
- ☐ Can we call your live demo line ourselves first?

3. Your 30-day pilot

- ☐ Start with after-hours and overflow calls only.
- ☐ Track one number: **after-hours calls** → **booked appointments**.
- ☐ Have someone read 10 transcripts a week and keep a "wrong answer" log.
- ☐ Re-check that bookings land correctly in the PMS for the first two weeks.
- ☐ At day 30, compare against your baseline. Keep it, fix it or cancel it.

4. Make sure your own information is right

- ☐ Your website's hours, insurance list and new-patient policy are current. The AI will repeat whatever you give it.
- ☐ There is **one source of truth** for policies, so the phone bot, website and team give the same answer.
- ☐ Your Google Business Profile hours match.

5. Compliance must-haves

- ☐ US practices: a signed business associate agreement with any vendor that handles PHI ([HHS guidance](#)).
- ☐ Canadian practices: confirm the vendor's privacy terms meet your provincial privacy obligations, and ask where data is stored.
- ☐ Call-recording notice: confirm the greeting meets the consent rules where you and your patients are.
- ☐ Any clinical AI (imaging): dentist reads first, AI as second reader, findings reconciled with the exam ([Farran, Dentaltown](#)).

This checklist is general information, not legal advice. Last reviewed October 17, 2026.
Latest version and the weekly brief: operator.tryadoptly.com

► What should I ask an AI receptionist vendor in a demo?

► Is the AI front-desk checklist free?

Sources

1. [HHS: Business Associate Contracts guidance](#)
2. [Dentaltown, Howard Farran: Dental AI and the Risk of Overtreatment](#)

Related reading

Dental AI receptionists compared

Dentina, Arini, Enamly, Viva, Weave, HeyGent, Bellwicket

What AI can and can't do for a dental practice

A practical answer to the "AI bubble" question

Why website chatbots fail

The Air Canada ruling and what it means for your site (Botday)

AI tool guides for small businesses

Plumbers, salons, restaurants, real estate (Adoptly)