

**Welcome to the
Uncork Yourself RDHAP
“Mix & Mingle”**

“The RDHAP Smart Start”

“Building a Profitable RDHAP Practice from Day One”

“Helping RDHAP Professionals launch with clarity, confidence, and best of all, clean books!”



Jennine Morel | Accountant & Business Strategist

Advanced Bookkeeping Concepts

www.advancedbookkeeping.com

(909) 660-3999

What do I do?

I assist my clients with bookkeeping, accounting, tax advisory/planning and other advanced accounting support services.

My areas of expertise, in addition to accounting, are All Things Start-Up, Business Plans/Planning, Project Management, Operations Management, QuickBooks and other account software, Financial Projections/Forecasting, Budgeting, General Business Management and much more!

Agenda:

Today, I'm going to walk you through the basics of starting your RDHAP business the right way.

What This Is About

This is not about doing everything at once.

This is about:

- Starting correctly
- Avoiding common mistakes
- Setting yourself up to actually make money

Before You Start

Ask yourself:

- Am I ready to run a business, not just do clinical work?
- Can I make decisions on my own?
- Am I willing to learn new skills?

You are not just a hygienist anymore — you are the CEO.

Are You Ready to Start Your Business?

Questions to ask yourself:

- Is entrepreneurship for you?
- Are you comfortable taking risks?
- Are you an independent thinker/decision maker?
- How are your negotiation skills?
- Are you creative?
- Do you have a network of support?

What It Takes

Starting a business comes down to 3 things:

- Planning
- Money decisions
- Legal setup

The 5 Pillars

To build a profitable RDHAP business, you need:

1. Legal Setup
2. Financial Setup
3. Pricing & Budgeting
4. Profit & Taxes
5. Marketing & Clients

10 Steps to Starting a Business

1. Write a Business Plan
2. Get Business Assistance or Training
3. Choose your business location
4. Finance Your Business
5. Determine the Legal Structure of Your Business
6. Register a Business Name (“Doing Business As”)
7. Get a Tax Identification Number
8. Register for State and Local Taxes
9. Obtain Business License & Permits
10. Understand Employer Responsibilities

Why Start Your Own Practice?

- Freedom, flexibility, income potential
 - Choosing who you work with
 - No cap on earnings
 - A schedule that works for you
- Create a business that fits your lifestyle
 - Work around family
 - Vacations
- But... it's more than just clinical work—you become the CEO
 - You are now the boss!

Pillar 1: Legal & Business Setup

- *Choose your entity:*
 - LLC, S/C-Corp, Sole Proprietor – which one, why, when to restructure
 - Pros & Cons
- *Get your:*
 - Business license, Fictitious Business Name (“DBA”), EIN
 - NPI (National Provider Identification)
 - Proper insurance(s) – General Liability, Workman’s Comp
 - Contracts in order – legal contracts to work with different agencies

Tip: Get a dedicated email, phone, professional voicemail, address

Plus: You can apply for an NPI for **free** at <https://nppes.cms.hhs.gov/>. It takes just 10–15 minutes and is a one-time setup

Pillar 2: Financial Foundations

- *Open a business bank account*
 - keep your personal and business money separate!
- *Choose software:*
 - You may not need software in the beginning portable filing system
 - Teledentix
 - Spreadsheet Solutions (Excel, Google Sheets, other)
 - QuickBooks Online is my go-to – why, when and how
- *Track income/expenses from the start*

Pillar 3: Pricing & Budgeting

- Don't price out of fear
 - Price based on value and costs
 - Pricing - UCR Fees
- Know your break-even:
 - Developing Financial Projections
 - Rent, Equipment, Mobile unit,
 - PPE (Personal Protective Equipment)
 - Other supplies
- Use a simple budget to stay in control; be proactive with spending, not reactive

Pillar 4: Planning for Profit & Taxes

- Pay yourself consistently (even small!)
- Set aside taxes monthly (25–30%)
- Creating a reasonable budget
 - Not taking on too much debt
 - Keeping debt manageable
 - Types of debt
- Think profit-first: income → profit → taxes → expenses
 - “Profit First” – book by Mike Michalowicz

Pillar 5: Marketing & Client Relationships

If you are not marketing, you are not in business

- Identify your services
 - Specializing, Mobile, other ways and solution you offer
- Identify your target market
 - “Niche-ing” down
 - Create the avatar
- Word-of-mouth is gold: Build referral relationships
 - DDS (Doctor of Dental Surgery)
 - SNF (Skilled Nursing Facilities)
 - Retirement Communities
- Other options
 - Health fairs, Senior Centers, friends and family, networking!

Pillar 5: Marketing & Client Relationships

Take care of the ones you have!

- Retention cost less than acquisition
 - It is way is more cost effective to take really good care of your current clients than find new one
- Have a process:
 - Client onboarding
 - Creating forms,
 - Taking/Managing payments
 - Scheduling
- Nurturing Leads & Stay Top-of-Mind: blogs, newsletters, reminder texts, follow-up & re-care systems

* **Common Mistake to Avoid**

Here are few things that could get you into trouble or cause you to not be as successful:

- ✘ Mixing personal & business money
- ✘ Undercharging out of guilt
- ✘ Doing it all alone
- ✘ Waiting too long to get help

Next Steps: How I Can Support You

Getting off to a successful start means working with someone to help you navigate, provide systems and accountability.

- Book a discovery call!
- Start RDHAP Mentorship
- “Ready, Set, Launch!”



Book a 20-minute call with me, for any accounting services.
Let's find out where you are in your journey and how I can best guide you.

90-Day Business Builder Accelerator

(*Limited to 12 Participants per Cohort)

We'll launch your business together, step-by-step with private and group support:

- ✓ Up to 6 private coaching sessions
- ✓ Legal Structure Support & Get it Filed!
- ✓ Guided bookkeeping setup, software (or not)
- ✓ Pricing and revenue planning
- ✓ Systems for billing, invoicing, tracking

Bonus: Financial Toolkit Templates & more



Let's connect.

Book a 60-minute call with me, for any RDHAP business questions.

WWW.SADERDHAP.COM

Dental Hygiene Practice Expansion

Operations & Practice Growth

- ✓ Streamlining your daily workflow (mobile or location-based)
- ✓ Improving scheduling, route planning, and time efficiency
- ✓ Setting up systems for ordering supplies, PPE, and inventory management
- ✓ Creating consistent protocols for patient care and documentation

Client Experience & Retention

- ✓ Building stronger patient retention systems (recare, follow-ups, reminders)
- ✓ Improving your onboarding process (forms, consents, intake flow)
- ✓ Creating a smoother payment and checkout experience

Revenue & Expansion

- ✓ Increasing your pricing with confidence
- ✓ Adding new services or specialties (mobile, niche populations, etc.)
- ✓ Expanding into facilities (SNFs, assisted living, community programs)
- ✓ Creating additional income streams within your scope

Bonus

- ✓ Access to templates, workflows, and training resources (to save time and avoid trial and error)

www.saderdhap.com

Free Goodies!

Start-Up Budget Planner

◆ One-Time Start-Up Costs

Item	Estimated Cost
Business Formation Fees (LLC, etc.)	\$
NPI / Licensing Fees	\$
Equipment & Supplies	\$
Website Setup / Branding	\$
Legal Docs / Contracts	\$
Initial Marketing Materials	\$
Continuing Education	\$
Insurance (Liability/Malpractice)	\$
Miscellaneous	\$
Total	

◆ Monthly Operating Expenses

Expense	Monthly Cost
Phone / Email / Software	\$
Insurance	\$
Travel / Mileage / Gas	\$
Marketing / Ads	\$
Equipment Maintenance	\$
Bookkeeping / Admin Support	\$
Professional Memberships	\$
Continuing Education / Training	\$
Other	\$
Total	

◆ Projected Revenue

Source	Monthly Income
Mobile Dental Visits	\$
Facility Contracts	\$
Reimbursements / Insurance	\$
Other	\$
Total	

Free Goodies!

RDHAP Business Start-Up Checklist: From Dream to Done

✓	PRE-LICENSING PREP
<input type="checkbox"/>	RDHAP ELIGIBILITY + LICENSURE PROCESS
<input type="checkbox"/>	APPLY FOR NPI NUMBER
<input type="checkbox"/>	REGISTER WITH MEDI-CAL (IF APPLICABLE)
<input type="checkbox"/>	JOIN A PROFESSIONAL ORGANIZATION (E.G., CDHA)
<input type="checkbox"/>	
<input type="checkbox"/>	

✓	MARKETING & LAUNCH PREP
<input type="checkbox"/>	DEFINE YOUR SERVICES AND PRICING, IDEAL PATIENT OR FACILITY
<input type="checkbox"/>	DESIGN SIMPLE BRANDING (LOGO, BUSINESS CARD)
<input type="checkbox"/>	CREATE A STARTER WEBSITE OR LANDING PAGE
<input type="checkbox"/>	SET UP BUSINESS EMAIL, PHONE, ADDRESS, GOOGLE PROFILE
<input type="checkbox"/>	DRAFT INTRO LETTER, BROCHURES
<input type="checkbox"/>	SET UP SCHEDULING & CONTACT PROCESS

✓	LEGAL AND ADMINISTRATIVE
<input type="checkbox"/>	CHOOSE A BUSINESS STRUCTURE (S/C CORP, SOLE PROP)
<input type="checkbox"/>	REGISTER YOUR BUSINESS NAME
<input type="checkbox"/>	APPLY FOR EIN (EMPLOYER IDENTIFICATION NUMBER)
<input type="checkbox"/>	GET STATE & LOCAL LICENSES/PERMITS
<input type="checkbox"/>	BUSINESS BANK ACCOUNT & ACCOUNTING SYSTEM
<input type="checkbox"/>	OBTAIN BUSINESS INSURANCE

✓	MOBILE PRACTICE LOGISTICS
<input type="checkbox"/>	SECURE MOBILE DENTAL EQUIPMENT
<input type="checkbox"/>	ORDER PPE & INFECTION CONTROL SUPPLIES
<input type="checkbox"/>	CHOOSE EHR OR SCHEDULING SOFTWARE
<input type="checkbox"/>	SET UP CONSENT FORMS + HIPAA COMPLIANCE
<input type="checkbox"/>	TRANSPORTATION SETUP (VAN/CART/BAG SYSTEM)
<input type="checkbox"/>	



Questions?