

1. OPERATIONAL DIAGNOSIS: MANAGING EXISTING PATIENTS WITHOUT ADMINISTRATIVE BURNOUT

Zero Disruption to Clinical Workflow

During our operational audit at Smile Gallery Orthodontics, your priority was crystal clear: **your immediate goal is not merely answering more phone calls, but automating the administration of existing consultations** so you no longer spend evening hours sending follow-up texts, calculating insurance breakdowns, or updating statuses across Google Sheets, RingCentral, and Dolphin Management.

Bottleneck 1: Manual Tx Pending

Patients who leave consultations undecided ("I'll think about it") require manual tracking across a 5-tab Google Sheet, manual RingCentral texts, and 30-second Dolphin logins.

Bottleneck 2: Insurance & HIPAA Risk

Uploading insurance screenshots to consumer browser AI extensions exposes the practice to up to \$50,000 per HIPAA violation while still requiring manual HFD payment math.

Bottleneck 3: After-Hours Leakage

Calls arriving after 7:00 PM, on weekends, or when the front desk is busy risk going cold without an immediate under-60-second SMS engagement on your main line.

2. PROPOSED SOLUTION: SMILEOS™ WEB PORTAL + ON-PREMISE LOCALVAULT SERVER

Dedicated Dell OptiPlex 7050 Enclave

A. Tx Pending Recovery Engine

RingCentral API

Replaces your manual 5-tab Google Sheet with an instant Web Kanban board accessible by you in Chicago and John in the Philippines. Automatically dispatches Touch 1 (Day 2), Touch 2 (Day 5), and Touch 3 (Day 12) in English, Spanish, or Russian (Русский) via your official SMS line (773) 571-0554 with your custom HFD link (prequal.gohfd.com/SmileGallery). Automatically pauses the moment a patient replies.

B. Sovereign Insurance Vision OCR

HIPAA LocalVault

We install a dedicated, BitLocker-encrypted **M&G LocalVault Server (Dell OptiPlex 7050)** inside your clinic. Staff simply drops an insurance portal screenshot or card photo into SmileOS: the local AI extracts **Ortho Coverage %, Lifetime Max, and Waiting Period in 2 seconds**, calculates the exact HFD monthly installment, and prepares the 1-click SMS quote with **zero external data leakage**.

C. Frictionless Dolphin Bridge & 24/7 SMS

Zero Slowdown

No more waiting 30 seconds for Dolphin just to log follow-up #1 or #2. SmileOS ingests pending consults automatically and syncs final outcomes (*Started or Closed - Initial F/UP Complete*) after clinic hours. Includes automatic after-hours missed-call SMS rescue on (312) 500-2022.

3. IMPLEMENTATION OPTIONS & RETURN ON INVESTMENT GUARANTEE

System Package / Deliverable	Included Clinical Automation Scope	One-Time Setup	Monthly Operations
☐ Module 1: Tx Recovery CRM	SmileOS Kanban CRM + Automated Touch 1, 2, 3 RingCentral SMS sequences + Custom HFD financing link injection + Auto-pause on patient reply.	\$1,500 USD	\$450 / mo
☐ Module 2: LocalVault OCR & 24/7	On-Premise LocalVault Server (OptiPlex 7050) + HIPAA Insurance Vision OCR Scanner + HFD payment calculator + After-Hours missed call instant SMS.	\$1,200 USD	\$350 / mo
☒ Complete SmileOS™ Bundle (M1 + M2) ★ RECOMMENDED • SAVE \$500 SETUP	Full Turnkey System: Tx Pending Auto-SMS Engine + Web Kanban CRM (Chicago & Philippines access) + Dedicated OptiPlex 7050 HIPAA LocalVault Server + Insurance Vision OCR + Dolphin Sync + 24/7 Missed-Call SMS.	~~\$2,700~~ \$2,200 USD	\$550 / mo

Self-Funding ROI Math: With an average orthodontic case value of **\$5,000 USD**, recovering just **2 pending patients per month** generates **+\$10,000/mo (+\$120,000/yr)** while saving Dr. Alena **15+ hours/month** of evening administrative work.

18x Projected ROI

4. 11-DAY TURNKEY DEPLOYMENT ROADMAP

- Day 1:

Onboarding (15 min): Connect RingCentral API token, import current *Tx Pending* sheet & verify Dolphin export folder.
- Days 2-4:

LocalVault Prep (Off-Site): M&G configures the Dell OptiPlex 7050 with BitLocker encryption, Vision OCR & SQLite Vault.
- Days 5-9:

SMS & Zero-Trust Calibration: Calibrate Touch 1/2/3 templates, HFD links, and secure remote access for Dr. Alena & John.
- Day 11:

Plug & Play Go-Live (45 min): Connect headless LocalVault server to clinic router and launch 30-Day Pilot.

5. 30-DAY PILOT AUTHORIZATION & BAA SIGN-OFF

Selected: Complete Bundle (\$2,200 Setup + \$550/mo)

By signing below, Smile Gallery Orthodontics authorizes M&G Technology Solutions LLC to deploy the selected SmileOS™ module under a HIPAA Business Associate Agreement (BAA). Setup is billed 50% upon kickoff and 50% upon Go-Live (Day 11).

Type name or sign on print...

Dr. Alena Bukhar, DDS
Owner, Smile Gallery Orthodontics

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Goslen Burgos
CEO, M&G Technology Solutions LLC