



# How to Build a Custom GPT

## for Dental Office Front Desk Staff

### Before You Start

You will need a ChatGPT Team or Enterprise account (not a personal account). Check that your practice has reviewed your vendor terms and, if handling any patient health information, that a Business Associate Agreement (BAA) is in place before proceeding.

HIPAA reminder: Do not upload or enter any patient-identifying information unless your specific workflow has been formally reviewed and approved for PHI use. When in doubt, use de-identified examples only.

### STEP 1 Choose Your Workflow

Pick one narrow, repetitive task your front desk team handles every day. Start small. One job, one GPT.

#### Good starting points for front desk:

- Answering common patient questions about scheduling or cancellation policy
- Drafting voicemail and follow-up scripts for missed calls
- Walking staff through insurance verification steps
- Onboarding new front desk team members with policy Q&A
- Reformatting office policies into quick-reference checklists

#### Before moving on, define these four things:

- Who will use this GPT? (e.g., front desk receptionist)
- What will they give it? (e.g., a patient situation or question)
- What should it produce? (e.g., a phone script or checklist)
- When must they stop and escalate? (e.g., any clinical question → dentist)

Do not try to combine scheduling, billing, and clinical Q&A into one GPT. Keep it focused on a single role and task.

### STEP 2 Gather Your Source Documents

Your GPT will only be as good as the documents you give it. Collect the approved, current materials that cover your chosen workflow.

#### Recommended documents for a front desk GPT:

- Office handbook and staff SOPs
- Scheduling and cancellation policy

- After-hours and emergency routing protocol
- Accepted insurance list
- Approved phone scripts (if you have them)
- Financing and payment policy

**Rules for your source pack:**

- Only include documents that are current and approved by the office manager or dentist.
- Remove any file that contains real patient names, dates of birth, or other PHI.
- If two documents contradict each other, resolve the conflict before uploading, do not let the GPT guess.
- Keep the pack focused. Five tight documents outperform twenty loose ones.

## STEP 3 Write and Test Your Instructions in Chat First

Before opening the GPT Builder, perfect your instructions in a regular ChatGPT conversation. This is faster, easier to revise, and will save you significant time.

**Use this instruction structure:**

```
You are the Front Desk Assistant for [PRACTICE NAME].

Your job: Help front desk staff answer policy questions and
draft patient communication scripts.

Use only: the office handbook, scheduling SOP, cancellation
policy, after-hours protocol, and approved phone scripts.

Rules:
- Do not process or store any patient names or health information.
- Do not give clinical advice. If a caller mentions pain, swelling,
  or injury, provide the after-hours emergency script and stop.
- Do not confirm or promise insurance coverage. Direct those
  questions to the billing lead.
- If the answer is not in the uploaded documents, say so clearly.

Output format:
1. Direct answer
2. Recommended script (if applicable)
3. Escalation note (dentist / billing lead / office manager / none)
```

**Run at least 15 test prompts before building. Include:**

- Everyday tasks (drafting a cancellation script, explaining a policy)
- Edge cases (patient upset, unusual request)
- Things it should refuse (clinical question, insurance guarantee)
- Missing information (staff gives partial details, does the GPT ask or guess?)

Only move to Step 4 once the output is consistently accurate, appropriately cautious, and escalates correctly.

## STEP 4 Build the GPT

Once your instructions are tested and working, open the GPT Builder and configure it deliberately field by field.

### Name and description

Use a specific, role-based name. Example: Front Desk Policy Assistant – [Practice Name]. Avoid generic names like "Office Helper" that could be confused with other GPTs.

### Instructions field

Paste your tested instruction script directly into this field. Do not rely on the builder chat to write your instructions. It produces inconsistent results. Paste and review carefully.

### Knowledge files

Upload only the approved source pack from Step 2. Remove any document containing PHI. The GPT will reference these files when answering staff questions.

### Conversation starters

Add 3–4 realistic prompts your staff will actually use. This helps new users understand what the GPT can do and sets the right tone from the first interaction. Examples:

- "Draft a script for a patient asking about our no-show fee."
- "What's our process when a patient calls after hours about pain?"
- "Summarize our new-patient intake steps for a new receptionist."
- "Turn our cancellation policy into a one-page front-desk reference."

### Capabilities to keep these off

- Web search: OFF your GPT should use your documents, not the internet.
- Image generation: OFF not needed for this workflow.
- Code interpreter: OFF not needed for this workflow.
- Actions / integrations: OFF unless specifically reviewed and approved.

## STEP 5 Restrict Sharing and Get Sign-Off

Before anyone uses the GPT, lock down who can access it and get the required approvals.

### Sharing settings

- Set sharing to invite-only or workspace-only. Never publish an internal office GPT publicly.
- Share only with the staff role(s) that need it for this specific workflow.
- The office manager or dentist should be the GPT owner in the workspace.

### Required approvals before launch

- Office manager: confirms the workflow, documents, and instructions are approved.
- Dentist (if any clinical boundary language is included): reviews escalation rules.
- Billing lead (if billing policy is included): confirms billing-related language is accurate.

**Staff training (keep it short)**

- Show staff what the GPT is for and what it is not for.
- Walk through two or three real examples together.
- Make clear: they must review every output before sending or acting on it. The GPT drafts decide.
- Tell them who to contact if they see a wrong or risky response.

**STEP 6 Review, Maintain, and Improve**

A GPT is not a set-it-and-forget-it tool. Policies change, payers change, and staff find new edge cases. Build a simple maintenance habit.

**Quarterly review (minimum)**

- Re-read the instructions and confirm they still reflect current policy.
- Replace any source documents that have been updated.
- Run five to ten test prompts to confirm the outputs are still accurate.
- Update the version number and document the review date.

**Immediate review triggers**

- A payer changes a coverage or billing policy that your GPT references.
- A staff member reports an inaccurate or risky output.
- The office updates its scheduling, cancellation, or after-hours protocol.

**If something goes wrong**

- Stop using the GPT for that task immediately.
- Save a screenshot or export of the problematic conversation.
- Notify the office manager and, if PHI may have been involved, the privacy lead.
- Do not re-enable the GPT until the issue is corrected and re-tested.

**Launch Checklist**

Complete every item before sharing the GPT with staff.

Item	Done
Single workflow selected and clearly defined	<input type="checkbox"/>
Source documents are current, approved, and free of PHI	<input type="checkbox"/>
Instructions tested with 15+ prompts including refusal and escalation cases	<input type="checkbox"/>
GPT name is specific and role-based	<input type="checkbox"/>
Instructions pasted directly into the Instructions field (not generated by builder chat)	<input type="checkbox"/>

Knowledge files uploaded, approved source pack only	<input type="checkbox"/>
Conversation starters added and reflect real staff use cases	<input type="checkbox"/>
Web search, image generation, and unnecessary capabilities turned off	<input type="checkbox"/>
Sharing set to invite-only or workspace-only	<input type="checkbox"/>
Office manager sign-off obtained	<input type="checkbox"/>
Dentist reviewed escalation language (if applicable)	<input type="checkbox"/>
Billing lead reviewed billing-related language (if applicable)	<input type="checkbox"/>
Staff trained on approved uses, prohibited uses, and escalation steps	<input type="checkbox"/>
Next quarterly review date scheduled and documented	<input type="checkbox"/>

## Quick Reference: What This GPT Can and Cannot Do

✓ The GPT CAN help with...	✗ The GPT CANNOT replace...
Drafting patient call scripts	Dentist clinical judgment
Answering policy questions from office documents	Billing lead decisions on coverage
Summarizing procedures for new staff	Office manager approvals
Creating checklists from approved policies	Verified insurance information
Reformatting office materials into plain language	Final legal or consent language

Every GPT output must be reviewed by a staff member before acting on it or sharing it with a patient. You get the final decision.