

**Plan information:**

- All the plans include 2 x dental cleanings, 2 x fluoride varnish, 2 routine dental exams, 1 emergency dental visit, including all intraoral radiographs as necessary and 10% discount for all the other procedures for an individual
- All the enrolled members must not have been diagnosed with any form of periodontitis.
- The individuals with periodontitis or who need frequent visits for teeth cleaning must be enrolled into Gum care plan which covers up to 4 x dental cleanings.
- **Crucial Disclaimer: This is NOT a Dental Insurance**

Plan Selection (Check One)

☐ Essential Smiles (\$400/year) - 1 adult (18+) or teen (14+) with no gum (periodontal) disease

☐ Gum Care (\$650/year) - 1 adult with gum disease

☐ Couples Plan (\$750/year) - 2 adults (spouses/partners): both individuals must not have gum disease

☐ Family Plan (\$1,000/year) - 2 adults + 2 kids (1-13 yrs)

• Additional child (1-13 yrs): +\$250 each

• Teen (14-17 yrs): +\$350 each

Member Information

Primary Member: _____ DOB: _____

Spouse Name: _____

Children Names/Ages: _____

Patient Signature: _____ Date: _____

Office Use Only

Payment Received: \$_____ (Cash/Card/Check #)

Staff member name: _____

Activation Date: _____



Essential Smiles

Purpose and Intended Beneficiary:

The *Essential Smiles Plans* are crafted to offer an accessible and predictable dental care solution for individuals and families who do not possess traditional dental insurance, but want to prioritize regular dental visits and work towards improving long-term oral health.

Core Benefits and Annual Cost:

For a varying annual membership fee depending on the plan, members gain access to a defined suite of services. This includes two (2) routine dental exams, per 12-month membership period, the plan-specific number of dental cleanings and two (2) applications of topical fluoride varnish. To ensure comprehensive diagnostic capabilities, any intra-oral radiographs deemed clinically necessary by the treating dentist as part of the examinations included or other dental procedures performed at Carlisle Dental Care are also covered without any additional charge. Furthermore, the plan incorporates one (1) emergency visit, per 12-month period, providing critical access for urgent dental concerns. Beyond these core inclusions, members are extended a 10% discount on Carlisle Dental Care's usual and customary fees for any additional dental procedures not explicitly covered by the annual membership benefits.

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Discounted Additional Services:

Beyond the core included services, members of the *Essential Smiles Plan* receive a 10% discount on the practice's usual and customary fees for any other dental procedures performed at Carlisle Dental Care that are not explicitly part of the annual membership benefits. This discount is exclusively applicable to services rendered within Carlisle Dental Care and cannot be combined with any other offers, promotions, or third-party payment plans. To qualify for this discount, payment for these additional services is due in full at the time the services are rendered.

Membership Duration and Automatic Renewal:

The *Essential Smiles Plan* is established for a fixed term of twelve (12) consecutive months, commencing precisely on the enrollment date. To ensure continuity of care and convenience for members, the membership is structured to automatically renew for subsequent 12-month periods on its anniversary date. This automatic renewal will occur unless Carlisle Dental Care receives a written request for cancellation from the member at least fifteen (15) days prior to the impending renewal date. This provision ensures that members retain uninterrupted access to their benefits while also providing the practice with adequate notice for administrative adjustments.

Membership Dues, Payment, and Financial Policies:

The annual membership fee is required to be paid in full at the time of enrollment, **prior to the commencement of any services under the plan**. Carlisle Dental Care accepts various payment methods, including cash, personal check, or credit card. For seamless automatic renewals, members are required to authorize Carlisle Dental Care to charge the designated credit or debit card on file for the annual membership fee on each anniversary date.

Payments for any additional dental services, which are subject to the 10% membership discount, are due in full at the time these services are rendered, **prior to the commencement of those specific procedures**. It is imperative that members maintain a current and active membership status and ensure timely payments for both the annual fee and any additional services. Failure to do so may result in the immediate suspension or termination of membership benefits. In such instances, any services subsequently received by the patient will be charged at Carlisle Dental Care's then-current usual and customary fees, without the application of any membership discounts.

Cancellation Policy and Refund Procedures:

The cancellation and refund policies for the *Essential Smiles Plan* are structured to balance consumer protection with the financial viability of the practice, mitigating potential disputes and adhering to fair trade practices.

- **Cooling-Off Period:** Members are afforded a "cooling-off period," allowing them to cancel their membership and receive a full refund of the annual fee within five (5) calendar days following the initial enrollment date. This full refund is contingent upon the condition that no dental services or discounts have been utilized under the plan during this brief period. Should any services or discounts have been accessed within these five days, the member will be responsible for the full, non-discounted

usual and customary fees for those services. Any paid membership fees will then be applied towards these charges, with any remaining balance due from the member.

- **Cancellation After Cooling-Off Period (Before Term End):** If a member elects to cancel their membership after the initial five-day cooling-off period but prior to the conclusion of the 12-month membership term, no refunds will be issued for the annual membership fee. In such cases, the member remains responsible for the full, non-discounted usual and customary fees for all services received up to the cancellation date. Any portion of the paid membership fees will be applied towards these charges, and any outstanding balance will be the member's responsibility.
- **Cancellation After Minimum Term:** For memberships that have automatically renewed beyond the initial 12-month term, members may cancel by providing written notice to Carlisle Dental Care at least fifteen (15) days prior to the next scheduled annual renewal date. No refunds will be issued for the current annual term if cancellation occurs within this period, as the annual fee covers the full 12-month period from the renewal date.
- **Practice-Initiated Termination:** Carlisle Dental Care reserves the right to terminate a membership at any time for various reasons, including, but not limited to, non-payment of fees, a member's violation of the plan's terms and conditions, or the termination of the doctor-patient relationship. In situations where the practice initiates termination for reasons *other than* non-payment, a pro-rata refund for the unused portion of the annual fee may be issued at the sole discretion of Carlisle Dental Care.

Non-Transferability of Membership:

The *Essential Smiles Plan* is strictly non-transferable. It is intended solely for the use of the individual(s) explicitly registered as members on the agreement. Under no circumstances can the membership or its associated benefits be transferred to another individual, including other family members not explicitly enrolled, or to any other dental practice.

Patient Responsibilities and Appointment Policies:

Members enrolling in the *Essential Smiles Plan* assume certain responsibilities to ensure the effective utilization of their benefits and the smooth operation of the practice. It is the sole responsibility of the member to proactively schedule and diligently keep all appointments offered as part of the plan. To facilitate efficient scheduling and respect for other patients' access to care, members are required to provide Carlisle Dental Care with at least 48 hours' notice if they need to change or cancel a scheduled appointment. Failure to provide adequate notice may result in a missed appointment fee, which will not be

subject to the membership discount. Furthermore, members are responsible for promptly notifying Carlisle Dental Care of any changes to their contact information or designated payment method to ensure uninterrupted service and communication. Members also agree to adhere to the treatment plans and clinical recommendations provided by the treating dentist. Non-compliance with clinical advice or a failure to maintain adequate oral hygiene could negatively impact treatment outcomes and may affect the practice's ability to continue providing services under the terms of the plan.

Practice Rights and Limitations:

Carlisle Dental Care retains specific rights and operates under certain limitations within the framework of this membership plan.

- **Fee Changes:** Carlisle Dental Care reserves the inherent right to adjust the annual membership fees and the fees for all other dental services annually. Members will be provided with advance written notification of any such fee increases prior to their membership renewal date, allowing them to make informed decisions regarding continuation of their plan.
- **Specialist Referrals:** It is important for members to understand that the benefits and discounts provided under this plan apply exclusively to dental services rendered directly at Carlisle Dental Care. Fees for services provided by external dental specialists (e.g., oral surgeons, orthodontists, periodontists) or any other medical professionals to whom a patient may be referred are not covered by this membership plan. These external fees remain the sole financial responsibility of the patient.
- **Interpretation of Terms:** Carlisle Dental Care expressly retains the right to interpret the stipulations and provisions of the membership program.
- **Refusal of Service:** The practice reserves the right to refuse or discontinue service in specific circumstances, including, but not limited to, instances of insufficient patient cooperation, significant changes in a patient's health or mental state that render treatment unsafe, or a patient's failure to meet their financial obligations to the practice. This right is exercised to ensure patient safety and maintain the professional integrity of the practice.

Feel free to reach out in case of any additional questions