

THE DENTAL AI STANDARD

GUIDE TWO

How To Build Your First  
**Custom GPT**

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*The simple way to build a reusable AI tool your team can run without retyping a prompt every time.*

*Modeled after the NYC Dental Practice GPT*

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## What This Guide Is

At the event, you saw the NYC Dental Practice GPT. Four buttons on the front door. Click one. The GPT walks the team member through the task. Appeal letters. CDT code lookups. Team conflict scripts. Billing for imaging. The whole team uses it. Nobody has to write a prompt from scratch.

This guide shows you how to build your first custom GPT modeled after the same structure. Simple. One task at a time. Built so your team can use it on Monday morning.

***Build it once. The team uses it forever.***

## What You Will Get From This Guide

- Step by step instructions to build your first custom GPT inside ChatGPT
- A fill in the blank prompt template modeled after the NYC Practice GPT
- Real dental examples for the four most common front office tasks
- Common mistakes that will frustrate you and how to avoid them

## What You Need Before You Start

- A ChatGPT Plus account. Custom GPTs are not available on the free plan.
- Your Voice Authority Document from Guide One. If you have not built it yet, do that first.
- Thirty minutes of uninterrupted time
- One specific task you want the GPT to help with. Start small.

## What A Custom GPT Actually Is

A custom GPT is a version of ChatGPT that has been pre loaded with instructions about a specific task. You write the instructions one time. You save it. Then anybody on your team can click it and use it without writing a prompt from scratch.

Think of it like an SOP for AI. The SOP lives inside the GPT. When the team member opens the GPT, the instructions are already running. The team member just answers questions and the GPT produces the output.

## What The NYC Practice GPT Does

Four buttons on the front door.

- I need to write an appeal letter for a denied procedure
- Help me find the right CDT code for a procedure
- I need help with a team conflict at the practice
- We took imaging today, help me find the right billing code

Click any button. The GPT asks the team member structured questions. It confirms the answers before doing anything. Then it produces the output using only the information the team member provided. No invented clinical findings. No corporate language. No starting from zero.

***Custom GPTs turn one prompt into a system.***

# The Five Steps

Building your first custom GPT takes five steps. Do them in order. Do not skip any.

**Step One. Pick One Task**

**Step Two. Open The GPT Builder**

**Step Three. Write The Instructions**

**Step Four. Test It With Real Scenarios**

**Step Five. Share It With Your Team**

## Step One. Pick One Task

This is where most people go wrong on day one. They try to build a custom GPT that does everything. Appeal letters. SOPs. Reactivation messages. Team write ups. CDT lookups. Patient communication. All in one GPT.

Do not do that. Pick one task. The most repetitive task your team does every week. Build the GPT for that one task. Once it works, build another one.

### Good First Tasks To Pick

- Insurance appeal letters for one specific carrier
- Patient reactivation messages for patients overdue twelve months or more
- Morning huddle agenda based on the day's schedule
- New patient welcome letter
- Treatment plan follow up call script for unscheduled treatment

### Bad First Tasks To Pick

- Anything you only do a few times a year
- Tasks with too many variables. Like full case presentations for any procedure for any patient with any insurance.
- Tasks where the output has to be different every single time
- Tasks you have never done yourself manually. Build the GPT for what you already know how to do.

### Your Turn

**The one task my first custom GPT will help with:**

*Write the task in one sentence. Be specific.*

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## Step Two. Open The GPT Builder

Inside ChatGPT, here is how you get to the GPT builder.

1. Log in to ChatGPT with your Plus account at chat.openai.com
2. In the left sidebar, click Explore GPTs
3. At the top right, click the button that says My GPTs
4. Click Create a GPT

You will see two tabs at the top. Create and Configure.

### Skip The Create Tab

The Create tab tries to build your GPT through a back and forth conversation. It is slower and less precise. Click the Configure tab instead. That is where you will write the real instructions.

***Always use Configure. Never use Create.***

## Step Three. Write The Instructions

This is the part that makes or breaks the GPT. The instructions are everything. Spend the most time here.

Inside the Configure tab you will see several fields. Here is what to put in each one.

### **Name**

Name the GPT something clear and specific. Bright Smile Appeal Letter GPT. Front Desk Reactivation GPT. Periodontal Insurance Narrative GPT. Do not name it Assistant or Helper. Be specific so your team knows what it does.

### **Description**

One sentence about what the GPT does. This shows up under the name when your team opens it. Example. Walks you through writing a Delta Dental appeal letter for a denied crown.

### **Instructions**

This is the big one. The instructions field is where you write everything the GPT needs to know to do its job. Use the template below. Fill in the parts in brackets with your own information.

# The Custom GPT Instruction Template

Copy this template. Paste it into the Instructions field inside the Configure tab. Replace the parts in brackets with your information.

## ROLE

You are a [job title] working at [practice name and type]. You have over two decades of experience in [specific dental specialty or task]. You are precise, professional, and you always confirm details before producing output.

## PRACTICE CONTEXT

[Paste your full Voice Authority Document here. Every section. Word for word.]

## WHAT THIS GPT DOES

This GPT helps front office team members [describe the one task in one sentence].

## HOW THIS GPT WORKS

When a team member opens this GPT, do the following:

Step One. Greet the team member and confirm what they need help with today.

Step Two. Walk the team member through structured questions one at a time. Never ask all questions at once. Ask one. Wait for the answer. Then ask the next one.

Step Three. Before producing output, confirm the team member's answers by summarizing what they told you. Ask if anything needs to be corrected.

Step Four. Produce the output using only the information the team member provided. Never invent details that were not given to you.

## QUESTIONS TO ASK

[List the specific questions your GPT should ask the team member. Be detailed. Example for an appeal letter GPT:

1. Which insurance carrier denied the claim?
2. What is the CDT code that was denied?
3. What clinical findings are documented in the chart?
4. Has this been appealed before?]

**OUTPUT FORMAT**

[Describe what the output should look like. Example:  
A formal appeal letter under two hundred words. Professional clinical tone. No patient identifying information. End with a clear request for expedited review.]

**RULES YOU MUST FOLLOW**

- Never use patient names or dates of birth in any output
- Never invent clinical findings that were not provided
- Always ask for clarification when context is missing
- Always confirm details before producing final output
- Always use the practice voice rules from the Practice Context section above

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## Conversation Starters

Below the Instructions field, you will see Conversation Starters. These are the buttons on the front door of your GPT. Just like the four buttons on the NYC Practice GPT.

Write the buttons exactly the way a team member would say them. Not the way you would describe them. Examples that work.

- I need to write an appeal letter for a denied procedure
- Help me find the right CDT code for a procedure
- I need help with a team conflict at the practice
- We took imaging today, help me find the right billing code

Add up to four conversation starters. Make them sound like a real question your team would actually ask.

## Capabilities And Knowledge

You can ignore Knowledge files for your first GPT. You can also turn off Web Browsing, DALL E Image Generation, and Code Interpreter. Your first GPT does not need any of those features. Keep it simple.

## Step Four. Test It With Real Scenarios

Before you share the GPT with your team, test it yourself. Use real scenarios from your own practice.

### Test One

Click the GPT yourself. Click one of your conversation starter buttons. Go through the whole process as if you were a brand new front desk hire. Does the GPT ask the right questions? Does it confirm before producing output? Does the output sound like your office?

### Test Two

Try to break it. Type something vague like just write the letter. Does the GPT push back and ask for the missing information? Or does it generate something with invented details? If it invents anything, go back to the Instructions field and strengthen the rules section.

### Test Three

Give it a real case. A real denial from last week. A real reactivation patient. A real team situation. Compare the output to what you would have written yourself. If the output is ninety percent of what you would write, the GPT is ready. If it is fifty percent, go back and refine the Instructions field.

***Test it five times before you share it. Not once.***

## Step Five. Share It With Your Team

Once the GPT works the way you want, you can share it with your team.

5. In the top right corner of the GPT builder, click Save
6. Choose who can see it. For team use, select Only people with a link
7. Copy the link
8. Send the link to your team in a shared document or pinned message

### Important Note

Every team member who uses your custom GPT needs their own ChatGPT Plus account. There is no way around that right now. If your practice is serious about AI, build that into the budget. The cost of one ChatGPT Plus seat is less than one hour of an office manager's time per month.

### Train The Team On Day One

When you roll out the GPT to your team, sit with each person for fifteen minutes. Walk them through the four conversation starter buttons. Show them what to expect. Let them try it themselves. Answer their questions. Then walk away. Within a week, the team will be using it without thinking about it.

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## Common Mistakes To Avoid

### Trying To Build Too Much At Once

Your first custom GPT should do one thing well. Not five things poorly. Build one. Get it working. Then build the next one. The NYC Practice GPT did not start with four buttons. It started with one.

### Skipping The Voice Authority Document

If you have not built your Voice Authority Document yet, your custom GPT will sound generic. The Voice Authority Document is what makes the GPT sound like your office instead of a stranger's office. Build the document first. Then build the GPT.

### Vague Instructions

The most common reason a custom GPT produces bad output is vague instructions. If you tell the GPT to write a good appeal letter, it will guess what good means. If you tell the GPT exactly what to include, how long to make it, what tone to use, and what to leave out, the GPT will follow those rules. Be specific.

### Not Confirming Before Output

If the GPT does not confirm details before producing the final output, it will invent things. Always include a step in the instructions that says Confirm with the team member before producing the final output. This single line eliminates ninety percent of fraud risk and quality problems.

### Treating It As Done

Your first version of any custom GPT is not the final version. Every week, ask your team what is working and what is not. Refine the Instructions field. Add new rules. Remove old ones. The GPT gets better the more you use it.

## What To Do When You Get Stuck

You will hit walls. Building custom GPTs takes practice. Here are the most common situations where teams get stuck.

- The GPT keeps asking too many questions and the team gets frustrated
- The GPT produces output that sounds clinical but is not clinically accurate
- The GPT works for you but not for the rest of the team
- You want to combine multiple GPTs into one with several buttons like the NYC Practice GPT
- You want to add knowledge files like your fee schedule or your CDT code list
- You want to build a GPT library for the whole practice with version control

Every one of these situations is exactly what the AI Ready certification at [dentalaistandard.com](https://dentalaistandard.com) is built to solve. The certification covers the advanced custom GPT build. Multi step workflows. Knowledge file integration. Team rollout playbooks. Quality control reviews. The full system.

This guide gets you your first working custom GPT. The certification gets you a full GPT library that runs your practice.

***The knowledge is still yours. AI Ready gives you the system to use it faster.***

# Ready For The Next Step

## AI Ready Certification

The Dental AI Standard. Level One.

Six weeks. Six modules. Live cohort sessions every Friday. The full system behind everything you saw at the live event.

**Enroll at [dentalaistandard.com](https://dentalaistandard.com)**

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### Questions?

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