New Team Member On-Boarding Process

Front Office – Week One

Pre-Board:

1. Review where the team parks at the office
2. Discuss the start time and the morning huddle
3. Give advice and guidelines on dress code
4. Have your new team member navigate your website from her own computer to learn more about your services, mission and current team members.
5. Let her know who her mentor is for the week and what to expect during the first week.
6. Create your new team member a login user name and password for the Dentrix system. Go to the Office Manager > Maintenance > Practice Setup > Practice Resource Center > add new info in the Staff section. Then go to Office Manager > Maintenance > Practice Setup > Passwords > User Passwords to set up her rights in the office.

The goal for the next 4 weeks is go give your new team member the resources she needs to be familiar with the routines of the practice. Since most of her day will revolve around the computer there is a big focus on understand the computer software and a basic "Best Practices" to start with. After she gets a good foundation of the computer and navigating around the office then we can schedule more detailed, intensive training around the specifics of the office.

Day One:

1. Introduce new team member to her mentor that she will be shadowing for the week. The mentor will be with her during the week, so she gets to know where everything is in the office and answer questions about the patient experience.
2. Morning Huddle – during the full team huddle go through give a little tutorial about what you talk about. Give her a print out of your office Vision Statement.
3. Morning Huddle – front office huddle, map out what each front office team member needs to get done today and if anyone needs "off the floor time"
    a. Introduce her to where she will sit and give her the Dentrix user ID and password you already created in the computer. She can change it if she wants.
    b. Give her a tutorial on how the phone system works and how to message other team members.
    c. If you use an IM system, make sure she has the instructions on how it works.
    d. Give her a tour of the office so she knows where everything is.
    e. Make sure she knows where the office manuals are and any tip sheets you use for office protocols and policies.
    f. Teach her how to answer the phone and how the phone system works.

4. Start the Dentrix Mastery Track Essentials Courses – have her sit at a computer that is away from the business of the patient flow. These courses give the new team member a good overview of the Dentrix software which is critical to her success at the office. Since her entire day revolves around the software it is key that she learn the software from the ground up, starting with the basics (even if she has Dentrix experience).
    a. Go to http://www.dentrix.com/support/resource-center
    b. Login to the Resource center with your Dentrix ID and zip code.
    c. Register for the Mastery Tracks by creating an account.
    d. Under the Dentrix Essentials click on Patient Information Essentials and click the blue button for Courses.
    e. Take the Patient Information Essentials courses and quizzes. This will take approximately 2 hours to complete.
5. Lunch – select 2-4 patients that the new team member will observe from check in to check out. Let these patients know you are training a new team member.
6. Observe the clinical team in the afternoon to get a feel for how the patients are talked to, how treatment is discussed and the interaction between employees.
    a. Observe an entire hygiene appointment from start to finish twice (two different hygienists)
    b. Observe two different doctor visits
7. Wrap up with the mentor and ask any questions. Discuss verbal skills, what is expected from the office and what is expected from the patient.

<u>Day Two:</u>

1. Observe with mentor during the morning huddle. During the morning huddle choose a hygiene patient that the new team member will observe from check in to check out and one restorative patient. Let these patients know you are training a new team member.
2. Lunch
3. Take the next Dentrix Mastery Track Essentials Course – Scheduling Essentials Appointment Essentials. Go to the Dentrix Resource Center > Get Your Training and click into the Dentrix Mastery Tracks Essentials courses. This course will give your new employee general information about the scheduling processes in Dentrix and will take about 1.5 hours to complete.
4. Continue the clinical observation if you ran out of time in the morning.
5. Wrap up with mentor at the end of the day

<u>Day Three:</u>

1. Morning Huddle – new team member is still only observing the morning huddle
2. Morning Huddle – front office, map out the day and schedule “off the floor time”
3. Have the new team member watch Katherine Eitel’s webinar “Have them at Hello, Unscripted Phone Skills for the Exceptional Practice.” Click here to log in to Novonee

and watch the webinar . . . https://novonee.com/events/have-them-at-hello-unscripted-phone-skills-for-the-exceptional-practice/

4. Observe front office flow and learn how they answer the phones. Make sure she has a copy of the new patient intake form. If you need an example Dayna can provide one.
5. Lunch
6. Take the next Dentrix Mastery Track Essentials Course – Continuing Care Essentials. This course will give information into how the Dentrix recare system works and should take about 1 hour to complete.
7. Have her start navigating through the computer system and answering phones along with her mentor.
8. Wrap up day with mentor and ask any questions.

Day Four:

1. Morning Huddle – observing and starting to learn what her role will be during the huddle.
2. Morning Huddle – front office, map out the day and schedule "off the floor time"
3. Take the final Dentrix Mastery Track Scheduling Essentials Course – Office Journal Essentials. The Office Journal is a key ingredient with the front desk and this course will give good information. It should take about an hour to complete.
4. Observe with a different front office team member for the day if you have more than one. Asking questions and learning how the patients flow through the practice.
5. Wrap up and prepare for next morning huddle. New team member should be introduced to her role in the morning huddle and be able to participate.

Day Five:

1. Morning huddle – have new team member participate in the huddle.
2. Morning huddle – front office to map out the day and schedule "off the floor time"
3. New team member now starts navigating through the computer with the help of her mentor.
4. Start answering phones, scheduling and checking patients in. Also, help confirm patients for the next day who have not confirmed yet.
5. Lunch
6. Watch the Continuing Care – "The Lifeblood of Your Practice" This webinar will take the information that was taught in the Dentrix Essentials Mastery course and give some best practices skills to it. This webinar is about an hour and there is no quiz.
    a. Log in to Novonee - https://novonee.com/events/continuing-care-the-lifeblood-of-your-practice/
    b. Navigate through the computer to understand what was taught during the webinar.
7. Start making calls from the Continuing Care List, making notes in the Office Journal and scheduling patients.

Day Six:

1. Morning Huddle – participates in the huddle as a regular team member.
2. Morning Huddle – front desk to map out the day and schedule "off the floor time"
3. Watch the webinar "Keeping Your Schedule Full". This webinar is about an hour and will give your new team member an outline of the reports used to keep the schedule full and not let patients fall through the cracks.
    a. https://novonee.com/events/keeping-your-schedule-full/
    b. Navigate through the computer to understand what was taught during the webinar.
    c. Use the tip sheets as resources for managing the four reports that were discussed in the webinar. Email dayna@novonee.com if you do not have these tip sheets on file.
4. Start making calls from these lists, making notes in the Office Journal and scheduling patients.
5. Help answer phones and schedule patients

Day Seven:

1. Morning Huddle – full team huddle and front office huddle.
2. Final day of on-boarding. Your new team member has had a week to be introduced to the office systems, patient flow and the computer system. She should feel comfortable to answer phones, schedule patients and make calls to fill the schedule. These are the basic tasks related to working at the front desk.
3. Go through the checklist with your new team member and make sure she has a good understanding of the basic components of the software. She should have the test results from the Dentrix Mastery Track courses.
4. If you are using a 3rd party software for emails and text messaging to communicate with patients make sure she has an in depth training session with this online portal. She should have a good understanding of how it works and what her role is with managing it.

Depending on her role in the office you can now start to train her on specific job-related duties. Once she has completed the specific training protocol for her role then have her take the training protocol for all other roles in the practice, so she can be cross-trained along with all other team members in the office.

For the next 90 days schedule a 15-minute meeting once a week to follow up with questions and make sure she has all the resources she needs to be successful. Follow up with her progress by tracking the Office Journal entries and reviewing the reports.

Financial/Insurance Coordinator

On-Boarding

Week two will be adding on the specific training for the financial aspects of the practice. This will include insurance and patient accounts receivable. During this next week she will need to follow the same protocol of taking webinars and learning your specific office policies. The intent of the webinars is not to teach her your specific protocols but to give her an overview of the computer system.

Day Eight:

1. Morning Huddle – full team huddle and front office huddle
2. Take the next Dentrix Mastery Track Essentials Course – Financial Essentials. Go to the Dentrix Resource Center > Get Your Training and click into the Dentrix Mastery Tracks Essentials courses. This course will take approximately two hours to complete so find a good time during the day to break away from the front desk. This course will take approximately 1.5 hours to complete.
3. After completing the Financial Essentials course, navigate through the computer to get a feel where the reports are.
4. Finish out the day answering phone, scheduling and working on projects.

Day Nine:

1. Morning Huddle – full team huddle and front office huddle
2. Continue learning about the daily, weekly and monthly guidelines by watching these three webinars. There are no tests involved with these webinars and are used to give a look into best practices for running a front desk successfully. These webinars are generic in nature and the practice might have some specific details that need to be added to the daily, weekly and monthly protocol. Each one is about 1 hour.
    a. Best Practices . . . Daily https://youtu.be/5sZ7hjbdnQs
    b. Best Practices . . . Weely https://youtu.be/mUQu040pEh0
    c. Best Practices . . . Monthly https://youtu.be/GjJXcdtyLyE
3. Start mapping out the Daily, Weekly and Monthly plan according to the office schedule.
4. Meet with the doctor or mentor if there are questions.

Day Ten:

1. Morning Huddle – full team huddle and front office huddle
2. Dive in a little deeper into the insurance aspects of this position by watching this webinar https://novonee.com/events/dental-insurance-101/. It will take about an hour to watch and there is no quiz.

3. Continue applying all the knowledge to the daily tasks. Practice with the office "test" patients so you can enter information or switch to the Tutor Database. To switch to the tutor database, go to the Office Manager > Maintenance > Practice Setup > Preferences > Path > Switch to Tutor Database. Then close all Dentrix modules and re-open Dentrix.

Day Eleven:

1. Morning Huddle – full team and front office
2. Learn something new today. Treatment planning and case presentation is a big part of making sure the financial health of the practice is on track. Giving the patient a good treatment estimate will allow the patient to budget and know what to bring in for their appointment.
3. Today take the Dentrix Mastery Tracks Clinical Essentials courses to learn how to navigate the patient chart and treatment plan modules. Remember that the Dentrix Mastery Tracks are meant to give you details on how Dentrix works and is not meant to be "Best Practice" for this specific practice.
   a. Log into the Dentrix Mastery Tracks Essentials courses and start with the Charting Essentials and only take the first 4 lessons. These are part of treatment planning and it will be important to learn.
   b. Next, take the Treatment Planning Essentials courses to learn the basic components to the software. These lessons should take about an hour to complete.
4. Download the tip sheet for the Treatment Manager Report to follow up on patients with outstanding treatment. If you do not have this tip sheet yet email dayna@novonee.com.
5. Practice entering a treatment plan on a "test" patient, creating an estimate and make sure it is accurate. Take your skills learned from the Insurance 101 webinar to create accurate insurance estimates.
6. Apply what has been learned to the patients in the schedule as much as possible. Review their existing treatment plans to see how they are being organized.
7. Continue to develop the daily, weekly and monthly routine for the position. Meet with the mentor when questions arise.

Day Twelve:

1. Morning Huddle – full team and front office
2. Now let's take the Dentrix Mastery Track information and apply that to real life scenarios. Watch the webinar "Top Five Tips to Increasing the Cash Flow" will take what you have learned from the Dentrix Mastery Tracks and dive a little deeper. https://novonee.com/events/top-five-tips-to-increasing-the-cash-flow/ This webinar does not include a quiz and is about 1 hour long. It will give you some best practices into managing the collections, patient co-pay and communicating with the team.

Day Thirteen:

Take a break from webinars and start settling in.

Day Fourteen:

Schedule a meeting with your mentor and the doctor to talk about the first two weeks. Does the new team member need more resources? There are always more resources in the Novonee website to tap into and also she can post up questions in the Forum.

Scheduling Coordinator

On-Boarding

Week two will be adding on the specific training for the financial aspects of the practice. This will include insurance and patient accounts receivable. During this next week she will need to follow the same protocol of taking webinars and learning your specific office policies. The intent of the webinars is not to teach her your specific protocols but to give her an overview of the computer system.

Day Eight:

1. Morning Huddle – full team huddle and front office huddle
2. Learn something new today. Treatment planning and case presentation is a big part of scheduling and making sure the appointment book stays full. Knowing how to treatment plan in the computer and manage the cases is critical for a good scheduling coordinator.
3. Today take the Dentrix Mastery Tracks Clinical Essentials courses to learn how to navigate the patient chart and treatment plan modules. Remember that the Dentrix Mastery Tracks are meant to give you details on how Dentrix works and is not meant to be “Best Practice” for this specific practice.
    a. Log into the Dentrix Mastery Tracks Essentials courses and start with the Charting Essentials and only take the first 4 lessons. These are part of treatment planning and it will be important to learn.
    b. Next, take the Treatment Planning Essentials courses to learn the basic components to the software. These lessons should take about an hour to complete.
4. Download the tip sheet for the Treatment Manager Report to follow up on patients with outstanding treatment. If you do not have this tip sheet yet email dayna@novonee.com.
5. Practice entering a treatment plan on a “test” patient, creating an estimate and make sure it is accurate. Take your skills learned from the Insurance 101 webinar to create accurate insurance estimates.
6. Apply what has been learned to the patients in the schedule as much as possible.

Day Nine:

1. Morning Huddle – full team huddle and front office huddle to map out the day.
2. Continue learning about the daily, weekly and monthly guidelines by watching these three webinars. There are no tests involved with these webinars and are used to give a look into best practices for running a front desk successfully. These webinars are generic in nature and the practice might have some specific details that need to be added to the daily, weekly and monthly protocol. Each one is about 1 hour.

    a. Best Practices . . . Daily https://youtu.be/5sZ7hjbdnQs
    b. Best Practices . . . Weely https://youtu.be/mUQu040pEh0
    c. Best Practices . . . Monthly https://youtu.be/GjJXcdtyLyE
3. Start mapping out the Daily, Weekly and Monthly plan according to the office schedule.

Day Ten:

1. Morning Huddle – full team huddle and front office huddle to map out the day
2. Take a break from webinars and work on what has been learned so far and practice. The new team member can use a "test" patient or use the Dentrix tutor database to practice. To switch to the Dentrix tutor database, go to the Office Manager > Maintenance > Practice Setup > Preferences > Path > Switch to Tutor Database. Practice as much as possible.
3. Work on the scheduling reports, making notes in the Office Journal, scheduling patients, confirming and answering phones.

Day Eleven:

1. Morning Huddle – full team huddle and front office huddle to map out the day.
2. Watch a new webinar to gain more insight into the best practices for managing the appointment book and the schedule. https://novonee.com/events/holes-in-your-doctors-schedule/ This webinar gives your scheduling coordinator more information on keeping the doctors schedule full and following up on unscheduled treatment. It is about 1 hour in length and there is no quiz.

Day Twelve:

1. Morning Huddle – full team huddle and front office huddle to map out the day.
2. The Scheduling Coordinator has a very expansive role in making sure the schedule is full. She must understand not only how to schedule but also follow up with patients effectively. Continue to make follow up calls from all three reports (Unscheduled List, Continuing Care Report and Treatment Manager).
3. To add some best practices information about treatment plan management, watch this webinar https://novonee.com/events/the-anatomy-of-a-great-treatment-plan/ . This webinar is about 1 hour long and will give good detail about the treatment planning.
4. Create consistency with treatment plan presentation to treatment plan follow up.
    a. At presentation how do you present, print and save the estimate that you give to the patient? If there is no SOP sheet create one. Dayna can help with this.
    b. At follow up what report is used? What are all the steps involved? Create a SOP sheet for this if there is not one yet. Dayna can help with this.
5. Help answer phones, confirm and schedule patients.

Day Thirteen:

1. Morning Huddle – full team and front office mapping out the day and “off the floor time”
2. Sometime today watch the webinar “Managing Patient Treatment”. It is about an hour with no quiz. https://novonee.com/events/managing-patient-treatment/
3. The new front office scheduling coordinator is still in training mode and going live with patients as much as possible.
4. Continue to make calls from the Unscheduled List, Continuing Care list and the Treatment Manager Report.

Day Fourteen:

1. Morning Huddle – full team and front office to map out the day and schedule “off the floor time”
2. Final day of specialized on-boarding for your Scheduling/Treatment Coordinator.
    a. Is she ready to go live without any shadowing?
    b. Does she need more training on any of the modules in the software?
    c. Is she comfortable with the check in and check out process for all patients?
    d. Does she fully understand the continuing care system?

Your Scheduling Coordinator/Treatment Manager should understand all aspects of keeping the schedule full, following up on unscheduled patients, your online patient communication portal, where to make notes in the software and how to manage the new patients. If she is struggling with any of these tasks then re-visit some of the webinars or reach out to Dayna Johnson for customized training options.