

Training Schedule for Business Office Personnel

Orientation:

1. Complete employment forms; complete new employee checklist.
2. Learn job description.
3. Review training schedule.
4. Review OSHA/HIPPA guidelines.
5. Meet individually with each staff member.

Week One:

1. Read the Staff Policy Manual. Discuss questions with the Doctor.
2. Learn names of all other staff members.
3. Observe and learn:
 - a. Patient flow; patient reception and dismissal.
 - b. Methods of communication with patients at the desk and on the telephone.
 - c. Handling of incoming telephone calls for the Doctor and other staff members.
 - d. Filing system.
 - e. Supplies and forms storage and inventory system.
 - f. Division and overlap of duties between business office personnel.
 - g. Work closely with the Office Coordinator and the Doctor to understand duties.

During weeks Two and Three, concentrate on those areas which will be within your job description:

Week Two:

1. Reinforce items from Week One.
2. Learn methods of scheduling.
3. Learn to handle financial arrangements.
4. Learn recall system.
5. Begin to learn to use the computer for data entry and insurance billing.
6. Learn to check patients in and out.
7. Begin to learn charting method.
8. Learn to prepare for the "next-day."

Training Schedule for Business Office Personnel - continued . . .

Week Three:

1. Reinforce items from Weeks One and Two.
2. Learn to post payments on the computer or peg board and ledger cards.
3. Learn to close computer for end of day reports or balance day sheet.
4. Learn to make bank deposits.
5. Learn processing of accounts payable.
6. Learn office terminology and dental vocabulary.

Week Four:

1. Reinforce items from Week One, Two, and Three.
2. Learn insurance and Medicaid procedures.
3. Begin scheduling patients in appointment book.
4. Learn method of billing and aging of accounts for accounts receivable control.
5. Learn names of support personnel: lawyer, accountant, janitor, sales representatives, etc.
6. Learn about correspondence needs of the Doctor and the office in general.
7. Learn about statistics kept by the practice.

Week Five:

1. Reinforce items from Week One, Two, Three, and Four.
2. Become proficient in CPR. Enroll in a class if training is needed.
3. Meet with Office Coordinator and the Doctor to review training process.
4. Learn office emergency procedures.

Training Schedule for Clinical Personnel

Orientation:

1. Complete employment forms; complete new employee checklist.
2. Learn job description.
3. Review training schedule.
4. Review OSHA guidelines.
5. Meet individually with each staff member.

Week One:

1. Read the Staff Policy Manual. Discuss questions with the Doctor.
2. Learn names of all other staff members.
3. Observe and learn:
 - a. Patient flow.
 - b. Methods of communication with patients at the desk and on the telephone.
 - c. Greet and seat patients.
4. Learn different staff responsibilities.
5. Learn instrument and bur names.
6. Learn safety procedures for office.
7. Learn sterilization techniques.
8. Learn opening/closing duties.

Week Two:

1. Reinforce items from Week One.
2. Learn tray set-ups.
3. Do some chair side assisting with the hygienist at her direction.
4. Learn fee schedule and completion of super bill/routing slips.
5. Learn and practice rubber dam placement.
6. Review equipment maintenance schedule.
7. Learn office terminology and dental vocabulary.

Training Schedule for Clinical Personnel - continued . . .

Week Three:

1. Reinforce items from Weeks One and Two.
2. Learn charting methods.
3. Learn supply storage and inventory system.
4. Practice radiography techniques if you are certified. If not certified, enroll in a certification course as soon as possible.
5. Learn treatment procedures.
6. Do some chair side assisting with the Doctor at her/his direction.

Week Four:

1. Reinforce items from Week One, Two and Three.
2. Learn scheduling methods.
3. Learn appliance names and uses.
4. Learn procedure for lab ordering and prescription completion.
5. Learn to stock chair side units.
6. Learn to breakdown and clean x-ray processor and to replenish fluids.
7. Learn details of cleaning units, suction, handpieces, etc.

Week Five:

1. Reinforce items from Weeks One, Two, Three and Four.
2. Practice more chair side assisting. Strive to become proficient in techniques allowable under State law.
3. Learn procedure for handling medically compromised patients and their charts.
4. Learn to review health history forms and emergency patient questions.
5. Learn office emergency procedure.
 6. Become proficient in CPR. Enroll in a class if training is needed.

New Employee (√) Checklist

Employee's Name: _____ Hire Date: _____

Date Completed: _____ By: _____

- Resume and signed Employment Application on file.
- Personal information (birth date, phone numbers, addresses, emergency information) on file.
- W- 4 and/or I-9 forms completed.
- State and local tax withholding forms completed, if applicable.
- Report of New Employees, filed with Employment Development Department if required by your state.
- Insurance application forms completed and benefit pamphlet distributed for each plan.
- Process for taking any immunizations, such as hepatitis vaccine, is discussed, if applicable.
- Orientation to infection control program discussed, including all policies, procedures and protective attire.
- Systems/training manuals reviewed.
- Privacy Policy reviewed
- Information regarding blood-borne diseases discussed, if applicable.
- Work permit on file, if applicable.
- Verification of licenses and certifications, if applicable (copies of licenses and certifications in file).
- Hours/Work Schedule, pay rate, pay days, overtime, incentive plan reviewed, lunch, and break periods explained.
- Location of time card, time clock, or time sheet explained.
- Attendance, including whom to notify (and when) in cases of absence and tardiness.
- Name badge ordered.
- Key to office given to employee. Alarm system explained.
- Instructions given on opening and locking the office.
- Opening/closing duties explained.
- Security precautions (i.e., who can be admitted to the office) and emergency policies explained.
- Office tour completed.
- Location of storage and policy regarding personal belongings explained.
- Staff Policy Manual discussed with the employee. Dress/Appearance/Uniforms discussed.
- Benefits mentioned with the explanation that details will be provided when eligibility starts.
- Employee Acknowledgment Form completed, including the employee's signed statement that, he/she has read and understands the Staff Policy Manual. Introductory period information included if appropriate.
- Job description and Training Schedule for new employee explained; organization chart explained.
- Date set for employee performance planning and review conference.
- Explanation to employee of name that Doctor prefers staff to use when referring to or addressing the Doctor in front of patients.