

Orthodontic Assistant Training Outline

Pre Onboarding (at least 3 days before start date)

PM calls new hire

- Welcome to company & introduction
- Make sure new hire has completed new hire info before start date
- Review 2 forms of ID acceptable for 1st day
- Bring voided check
- Confirm date/time and location of start day
- Review dress attire

Day 1

New Hire Orientation with Practice Manager

- Attend morning huddle. Introduce the team member to staff and doctors and give tour around the office.
- Share the training schedule with the new hire so they understand expectations
- **New Hire Orientation**
 - [Orientation Videos](#)
- **HR Information**
 - Who to contact for help (Intranet)
 - Compliance Hotline
 - IT Helpdesk
 - Practice Manager Contact
 - Mentor Contact Information
 - Pay Cycles
 - Payroll Calendar
 - [HR Policies](#) on Intranet Page
 - Assist new hire in completing paperwork in WebApps
 - Collect I-9 documents (acceptable IDs)
 - State Licensure, Expanded Duties certificates, X-ray Certificate, etc.
 - Scan Licensure and certification into WebApps
 - [D4C Benefits Guide](#)
- **IT Orientation (Logins are created by HR & IT and sent to new hire's personal email, copying the hiring manager)**
 - Web Apps Log in
 - Network/Email Set Up
 - PMS Log In
- [Orthodontic Training & Development Manual](#)
- **Section IV Your Safety (OSHA & Compliance)- Page 52 (Manual) & LMS**
 - Complete the OSHA and Infection Control Training & Assessment on LMS
- Review [Policies & Procedures](#)

- Watch “If Saliva Were Red” Video
- Review the Orthodontic Exposure Control Plan
- Review Infection Prevention Policy & Procedures
- Water Quality Policy
- Indicator Strip Policy
- [Acknowledgement Forms](#)
 - [Job Description](#)
 - [Infection Prevention Policy & Procedures](#)
- Certifications and Immunizations
 - CPR Certification
 - Hep B/ Immunizations
 - TB Skin Test Form
 - Radiation Certificate
- **Section V- Emergency Protocols**
 - **Page 58 (Manual) & LMS**
 - Fire Emergency Plan
 - Medical Emergency Plan
 - Post Exposure Incident Plan
 - First Report of Injury
 - Aspiration or Swallowing of a Foreign Body
 - Emergency Protocol Assessment in LMS

Conclusion of Day 1

- Review of today’s learnings – Q & A
- Immunization Records
 - PM or Mentor informs new hire that all immunization records must be provided within **10 days of start date**
 - Specifically, the TB test needs to be current
 - The Hepatitis B series can be declined with a signed declination form [Hep B Declination Form](#)

Day 2

Location: Mentor Office

- [Orthodontic Training & Development Manual](#)
- **Section I- Patient Experience- Page 11 (Manual) & LMS**
 - The D4C Experience
 - 5 Star Service
 - Providers
- **Section II- Welcome to Orthodontics- Page 20 (Manual) & LMS**
 - Ortho Terminology & Tooth Chart (Provide [Study Guide](#))
 - Review Types of Treatment & Appliances
- Radiation
 - [ADA Radiograph Guidelines](#)

- Review Dental Radiographic Examination: Recommendations for Patient Selection and Limiting Radiation Exposure
- D4CDB [Radiograph Policy](#) is discussed and signed off (Document will need to be uploaded into WebApps)
- Review orthodontic Radiograph Instructions
 - Panoramic Radiograph
 - Lateral Radiograph
 - Common Errors while taking Panoramic/Cephalometric radiographs
- Hands on training with radiographs

Conclusion of Day 2

- Assessment in LMS
 - Patient Experience
 - Orthodontics

Day 3

Location: Mentor Office

- [Orthodontic Training & Development Manual](#)
- **Section III- The Orthodontic Patient Lifecycle- Page 41 (Manual) & LMS**
- New Patient Initial Visit
- The Ideal Orthodontic Consult
- Post Initial Visit Statuses
 - Starts
 - Same Day Starts
 - Scheduled Starts
 - Pending Ready / Will Call Back
 - Recall / OBS
 - No Tx Recommended / Tx Denied
- Initial Treatment Visit
 - Bonding Visit
 - Appliance Insert
 - Invisalign Insert
- Adjustment Visits / Invisalign Checks & Refinements
- Deband/Debond/Final Records Visit
- Retention
- **Section VI- Clinical Charting & Records- Page 62 (Manual) & LMS**
- Why is clinical charting important
- Do's and Don'ts
- Clinical Note
 - New Patient Consult charting format
 - Oral Hygiene Classification
 - Noting Patient comments
 - Post Treatment Evaluation
- Orthodontic Photography
- iTero Scanning

- Orthodontic Radiography
- Treatment charting in software
- Shadow mentor in the afternoon

Conclusion of Day 3

- Review today's learnings – Q & A
- Complete assessments in LMS
 - Orthodontic Patient Lifecycle
 - Clinical Charting & Records

Day 4

Location: Mentor Office

- [Orthodontic Training & Development Manual](#)
- **Section VIII- Orthodontic Assistant- Page 131 (Manual)**
- General requirements of the orthodontic assistant
- Office Policies and Protocols
- Procedures for Seating Patients
- Orthodontic Procedures
 - Basic orthodontic adjustments
 - Bracket Placement
 - Insert, Tie-in and Clip Archwire
 - Remove Ligatures
 - Remove and Replace Elastic Chain
 - Archwire Removal
 - Debanding and Debonding
 - Orthodontic impressions
 - Mixing Alginate and Taking Impression
 - Pour and Impression for Study Models
 - Other orthodontic procedures
 - Placement of Elastic Separators
 - Invisalign Impression Technique
 - iTero Scanning Technique
 - Removal of Elastic Separators
 - Routine Appliance Check
- Procedure Times
- Company Paperwork/Forms
 - Patient Information Sheets
 - New Patient Paperwork
 - Patient Registration and Health History
 - Notice of Privacy Practices
 - Photo, Video and Image Release
 - Patient Contract-Insurance and Office Policy
 - Patient Information and Consent

- Compromise Forms
- Referral

Conclusion of Day 4

- Review today's learnings – Q & A

Day 5

Location: Mentor Office

- Software training
 - Complete chart prep – preparing for a successful day
 - Chart notes
 - Tooth charting
- Restocking the Ortho unit at the end of the day
- Sit chairside with all patients to experience one of each procedure
 - Behavior Management
 - Digital scanning
 - Photos
 - Impressions/Fit Bands
 - Fitting of Expansion appliance etc.
 - Bonding
 - Place or changing of arch wires
 - Pour up of impressions and trimming of models
 - Seat Appliance
 - Any additional doctor specific procedures
- Patient Flow

Conclusion of Day 5

- Review today's learnings – Q & A
- Complete the Ortho Terminology & Tooth Chart Assessment on LMS (If employee receives a score below 80%, review the Ortho Terminology & Tooth Chart Study Guide and have HR reassign the test)

Day 6

Location: Mentor Office

- Continue with a complete day of chairside training
- Address any concerns
 - Go over procedures and answer any questions

Days 7-9

Location: Mentor Office

- Continue with a complete day of chairside training

- Review the Ortho Assistant checklist (Located in WebApps. The Practice Manager should utilize this list to ensure all areas of the job position have been reviewed and discussed.)
- Complete the Ortho Assistant assessment on LMS (If employee receives a score below 80%, review the Assessment Study Guide and have HR reassign the test)

Day 10

Location: Employee Home Office with Practice Manager

- Finalize training- review responsibilities, address questions
- Review and sign the [Training Program Completion](#) document (Login ➡ My Employees ➡ Employee Information ➡ Select Employee ➡ HR Tab ➡ Training/Certifications ➡ Add new ➡ Select Training and upload document)
- **Practice Manager- Please complete the checklist so the survey is sent; New Employee- Please submit the survey from Survey Monkey within 5 days of completing training.**