

## Orthodontic Records and Sterilization 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 1<sup>st</sup> 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 VII- Orthodontic Records and Sterilization Assistant- Page 151 (Manual)**
- General requirements of the Orthodontic Records and Sterilization Assistant
- Office Policies and Protocols
- 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

## Day 5

### Location: Mentor Office

- Software training
  - Complete chart prep – preparing for a successful day
- Restocking sterilization and records supplies at the end of the day
- Sit chairside with some patients to experience one of each procedure
  - Behavior Management
  - Digital scanning
  - Photos
  - Impressions
  - Pour up of impressions and trimming of models
  - Any additional doctor specific procedures

### 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 records, sterilization and lab 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 Records & Sterilization 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 Records & Sterilization 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.**