

Treatment Coordinator Training Outline

Pre Onboarding (at least 3 days before start date)

PM/Mentor 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

- **Records Practice**
 - Recap Photo, Scanning & Xray Training
 - Practice taking records on patients or mentor multiple times
- [Orthodontic Training & Development Manual](#)
- **Section VII- Treatment Coordinator- Page 83**
(Manual)
 - Role of the TC
 - General Requirements of the TC
 - Office Policies and Protocols
 - Common Barriers to Treatment
 - New Patient Workflow
 - Pre-visit Planning
 - Introduction Call
 - Insurance Verification & Understanding Insurance
 - Huddle/New Patient Prep
- Initial Visit Paperwork
- The Ideal Orthodontic Consult
 - Records/ Meet & Greet
 - Doctor Debrief
 - Exam
 - Treatment Presentation
 - Financial Presentation
 - Post Visit Statuses & Follow up
 - Compromise and consent forms
- Initial Visit Documentation
- New Patient Welcome Packet Folder
- Estimating Treatment Fees
 - Self-Pay Fee Sheet
 - Insurance Fee Sheet

- Discounts
- OrthoFi
- Contracts
- Financial Policy
- Referring Doctor Follow Up Letter & Documentation
- Practice Strategies
 - Throughout the Day
 - Scheduled Starts
 - Observation/Recall
 - Pending Ready or Will Call Backs
 - Recall/Observation/Growth & Guidance
- End of Day
- Start Goals & Contract Value Tracking
 - Start Goal
 - Contract Start
 - Appliance Placement Start
 - Total Monthly Contract Value Goal

Day 5

Location: Mentor Office

- Software Training- Hands on with Mentor
 - Registering a New Patient
 - Creating an account in the Practice Management System & OrthoFi (where applicable)
 - Completing the [New Patient Encounter Form](#)
 - Patient Information
 - Guarantor/Responsible Party Information
 - Insurance Information
 - Medical History
 - Dental History
 - OrthoFi
 - [Patient Creation](#)
 - [Patient Forms Emailing Timing](#)
 - Scheduling Appointments
 - New Patients
 - Recalls/Observations
 - Starts- Review Start appointment types & where to put them on schedule
 - Adjustments
 - Emergencies
 - Managing Reschedules, Cancellations and Broken Appointments
 - [Patient Exam Management](#)
- Transfer in/out patient policies
- Financial Policies

- End of Day Paperwork
- Start Goals & Contract Value Tracking
- Software training Consult Exam
 - Treatment charting
 - Questionnaire or Workflow used during exam
 - Role Play Exam- call out diagnostics to get comfortable hearing terminology & finding on software
- Role Play Financial Presentation

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

- Software Training
 - Insurance Verification
 - Checking OrthoFi for upcoming appointments
 - [Insurance Eligibility Management](#)
 - [Insurance Unable to Verify](#)
 - [Insurance Pre-Authorization](#)
 - Claims & Payments
 - Insurance filter in OrthoFi; Appliance Placement
 - [Insurance EOB/Payment Upload Process](#)
 - [How to Add a Payment Method](#)
 - Updating Treatment Statuses
 - Patient Ledger
 - [Patient Ledger Job Aid](#)
 - Contract signing/records appointment
 - [Disclosure Document Job Aid](#)
 - [Service Contract Job Aid](#)
- Start to shadow mentor
 - New Employee should take all records
 - New Employee should give Dr. Debrief
 - Photo collages should be printed for every patient and given to doctor at end of day to give critiques until they are happy with photos.
- Address any concerns
 - Go over Treatment types, appliances & fee sheets and answer any questions

Day 7

Location: Mentor Office

- Continue with a complete day of TC mentor shadowing

- In the morning
 - New Employee should take all records
 - New Employee should give Dr. Debrief
- Lunch Meeting with Doctor, New Employee & Mentor to review any other items doctor specifically likes in consult or charting
- In afternoon shadow Dr in clinic, take notes on any “start appointments” so they know personally what they are like
 - Insert Appliances
 - Bond Braces
 - Insert Invisalign

Conclusion of Day 7

- Review today’s learnings- Q&A
- Finish all templates from Lunch meeting with Dr & add to training binder

Days 8-9

Location: Mentor Office

- Role reversal: Mentor Shadows New Employee for all consults
- Review the Treatment Coordinator check off list (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 Treatment Coordinator Assessment on LMS (If employee receives a score below 80%, review the Treatment Coordinator Study Guide and have HR reassign the test)

Conclusion of Days 8 & 9

- Review that day’s patients
 - Chart Notes
 - Exam Questionnaire or Workflow
 - Records
 - Status
 - Contract
- Review any notes the Mentor took throughout day on areas of improvement as well as questions the new employee may have

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.**