

Front Office Training Outline

Pre Onboarding (at least 3 days before start date)

PM

- 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 (WebApps and LMS Logins are created by HR & IT and sent to new hire's personal email, copying the hiring manager)**
 - WebApps Login
 - Network/Email Set Up
 - PMS Login
- [Pediatric Training & Development Manual](#)
- **Section III Your Safety (OSHA & Compliance)- Page 39 (Manual) & LMS**

- Complete the OSHA and Infection Control Training & Assessment on LMS
 - www.inspiredLMS.com
 - User name = Employee D4C email
- Review [Policies & Procedures](#)
 - Watch “If Saliva Were Red” Video
 - Review the Pediatric Exposure Control Plan
 - Review Infection Prevention Policy & Procedures
 - Water Quality Policy
 - Indicator Strip Policy
- Acknowledgement Forms
 - [Job Description](#)
 - [Infection Prevention Policy & Procedures](#)
- **Section IV- Emergency Protocols**
 - **Page 45 (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 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

- [Pediatric Training & Development Manual](#)
- **Section I- Patient Experience- Page 9 (Manual) & LMS**
 - The D4C Experience
 - 5 Star Service
 - Providers
- **Section II- Welcome to Pediatric Dentistry- Page 20 (Manual) & LMS**
 - Dental Terminology (Provide [Study Guide](#))
 - Preventive Dentistry
 - Radiograph Guidelines
 - Orthodontic Preventive Care
 - Oral Hygiene Instructions
 - Parents in the Operator

- Behavior Management
- Sedation Options
- Patients with Special Healthcare Needs (SHCN)
- Silver Diamine Fluoride
- Dental Signs of Child Abuse
- Emergency Care/On Call

Conclusion of Day 2

- Review today's learnings – Q & A
- Complete assessments in LMS
 - Patient Experience
 - Pediatric Dentistry

Day 3

Location: Mentor Office

- [Pediatric Training & Development Manual](#)
- **Section V- Clinical Charting- Page 49 (Manual) & LMS**
- Tooth Anatomy
- Tooth Chart
- Why is clinical charting important
- Dos and Don'ts
- Clinical Note
 - Recare Note - PTENS format
 - Oral Hygiene Classification
 - Behavior Classification
 - Behavior Terminology
- Treatment Planning
 - Either-Or
- Clinical Forms
 - Extraction Consent
 - Existing Patient Medical History
 - New Patient Paperwork
 - Patient Contract-Insurance and Office Policy
 - Medical History
 - HIPAA
 - Photo Release/Social Media Release Form
 - Referral
 - Refusal of Treatment form
 - Report Cards
 - Sedation Forms
 - Stabilization Form
- Shadow a clinical employee (in appropriate PPE)

Conclusion of Day 3

- Review today's learnings – Q & A

- Complete assessment in LMS
 - Clinical Charting

Day 4

Location: Mentor Office

- [Pediatric Training & Development Manual](#)
- **Section VI- Front Office Coordinator- Review Manual- Page 97 (Manual)**
 - Answering the phone and phone etiquette
 - Confirmations and scripts
 - The Schedule
 - Appointment types, template, emergency, broken appointments
 - Check In
 - Check Out
 - Locum Tenens (GA & SC Only)
 - Records Release
 - Financial Policy
 - Revenue Cycle Management- Understanding the complete cycle and how the FOC responsibilities affect the process
 - Dental Insurance- Understanding maximums, deductibles, co-insurance and patient portions
 - Medicaid/State Insurance
 - Non Covered Service Form
 - Insurance Breakdown Form
 - Transferring Records
 - Inactivating Patient Accounts
 - Prescriptions
 - Marker and Alerts
 - Accommodating Late Patients
 - Forms 3300 (School Form)
 - Form 5 (Head Start)
- Shadow mentor if time permits

Conclusion of Day 4

- Review today's learnings – Q & A

Day 5

Location: Mentor Office

- Software Training- Hands on with Mentor
 - Registering a New Patient
 - Patient Information
 - Guarantor/Responsible Party Information
 - Insurance Information
 - Medical History
 - Dental History
 - Adding a sibling

- Scheduling Appointments
 - New Patient
 - Recalls
 - Consults
 - Operative
 - Emergency
 - Sedations
 - Hospital
- Canceled Appointments
 - Account Notes/Notes History
 - Unscheduled Patients
- Rescheduled Appointments
 - Account Notes/Notes History
- Broken/Failed Appointments
 - Same day only marker/alert
- Call/Quick Call List (DV or ES)
- Future Appointments
 - Recall
 - Treatment
- Confirmation
 - Confirmation list (DV)
 - Next Day, two day and three day
 - Confirmation notes
 - Copying notes to siblings
 - Move off unconfirmed state/Medicaid

Conclusion of Day 5

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

Day 6

Location: Mentor Office

- Software Training
 - Verifying New Insurance
 - Clearinghouse (Dental xChange, Change Healthcare, Remote Lite, etc)
 - Web Portals
 - Insurance Breakdown
 - Attaching Insurance
 - Account Balances
 - Understand Ledger
 - Transfer of balance (s)

- Collecting OOP
- Cash Receipt
- Verifying router with ledger
 - Attaching Scanned Documents
- Miscellaneous Code (If applicable)
 - 9000
- Boutique Items
 - Required Colgate products
 - Charging out boutique items

Conclusion of Day 6

- Review today's learnings – Q & A

Days 7-9

Location: Mentor Office to Shadow

- Continue with a complete day of hands on training
- Complete the Front Office Coordinator checklist (Located in HealthStream. The Practice Manager should utilize this list to ensure all areas of the job position have been reviewed and discussed.)
- Complete the Front Office Coordinator Assessment on LMS (If employee receives a score below 80%, review the Front Office Coordinator Assessment Study Guide and have HR reassign the assessment)

Day 10

Location: Home Office with Practice Manager

- 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.**