

Practice Manager Training Outline- Combo Office

Pre Onboarding (at least 3 days before start date)

FSM calls PM 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 Field Support Manager

- Attend morning huddle. Introduce Practice Manager 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**
 - 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; all additional logins are created and sent to D4C email)**
 - WebApps Login
 - Network/Email Set Up
 - PMS Login
 - FSM to assist in setting up all logins (PM Resources Document)
 - Login Page: [D4C Connect](#)
- [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
 - FSM informs PM 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: Employee Home Office with FSM or 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: Employee Home Office with FSM or 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: Employee Home Office with FSM or 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)

Conclusion of Day 4

- Complete the Insurance Test on LMS (If employee receives a score below 80%, review the Insurance Test Study Guide and have HR reassign the test)

Days 5 & 6

Location: Employee Home Office with FSM or Mentor Office

- Software Training- Hands on with Mentor or FSM
 - 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 6

- Complete the Dental Terminology Test on LMS (If employee receives a score below 80%, review the Dental Terminology Test Study Guide and have HR reassign the test)

Days 7 & 8

Location: Employee Home Office with FSM or Mentor Office

- [Orthodontic Training & Development Manual](#)
- **Section II- Welcome to Orthodontics- Page 20 (Manual) & LMS**
 - Ortho Terminology & Tooth Chart (Provide [Study Guide](#))
 - Review Types of Treatment & Appliances
- **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 if time permits

Conclusion of Day 8

- Review today's learnings – Q & A
- Complete assessment in LMS
 - Welcome to Orthodontics
 - The Orthodontic Patient Lifecycle
 - Clinical Charting & Records

Day 9

Location: Employee Home Office with FSM or Mentor Office

- [Orthodontic Training & Development Manual](#)
- **Section VII- Front Office Coordinator- Page 163 (Manual)**
- The Role of the FOC
- Office Policies and Protocols
 - Huddle Preparation
 - [Patient Account Management & Updates](#)
- Communication
 - Answering the Phone
 - New Patient Phone Calls
 - Confirmation Calls
 - Confirmation Scripts
 - Patient Communication Software
- The Schedule
 - Scheduling Techniques
 - Scheduling Office Workflow

- Scheduling Communications Center Workflow (where applicable)
- Schedule Preparation for the Next Day
- Ortho Emergencies
- Canceled/Broken/Missed Appointments
- Late Patients
- OrthoFi
 - Registering a New Patient/Scheduling a New Patient Exam
 - Insurance Verification
 - Insurance Eligibility Management
 - Insurance Unable to Verify
 - Understanding Orthodontic Insurance
 - New Patient Arrival-Initial Exam Appointment
 - Initial Exam
 - Contract Signing/Records Appointment
 - Treatment Status
- Incoming Referral
- Early Termination/Discontinuation of Treatment
- Patient Check Out
- Financial Policy
 - Locum Parentis
 - How to Add a Payment Method
- OrthoFi Collections Protocol
- End of Day- [End of Day Summary Form](#)
- Practice Strategies
 - Observation/Recall
 - Pending Ready Patients
- Shadow mentor if time permits

Conclusion of Day 9

- Review today's learnings – Q & A

Days 10 & 11

Location: Employee Home Office with FSM or Mentor Office

- [Orthodontic Training & Development Manual](#)
- **Section VII- Treatment Coordinator- Page 83 (Manual)**
- The 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
- Initial Visit Documentation
- New Patient Welcome Packet Folder
- Estimating Treatment Fees
 - Self-Pay Fee Sheet
 - Insurance Fee Sheet
 - Discounts
- 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
- **Records Practice**
 - Recap Photo, Scanning & Xray Training
 - Practice taking records on patients or mentor multiple times
- 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 11

- 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)

Days 12 -15

Location: Employee Home Office with Field Support Manager

Review [Practice Manager Manual](#)

- Overview of Position Responsibilities
- [Best Practice Pediatric Strategies- Recare](#)
- [Best Practice Pediatric Strategies- Case Management](#)
- [Best Practice Orthodontic Strategies- Ideal Consult](#)
- Print [Reporting Playbook](#)
 - Schedule Planning
 - Scheduled Days
 - Production Report
 - Supplies Budget Management
 - P&L Review
- Key Performance Indicators
- Human Resources
- Team Leadership
 - Huddles

- Monthly team meetings
- D4C Training Team
- Best Practice in Marketing
- General Policies and Procedures
- Compliance Program (**LMS Module**)
- Patient Communication Software
- Communications Center (where applicable)

Review PM Guide and Resources Document

See D4C Intranet Tab for Vendor Logins

- Resources and Departments Tab- FSM to train on processes
- Human Resources
 - WebApps Training
 - Position Requisition System (Taleo)
- Purchasing
 - Main Vendors- Henry Schein, American Ortho, Staples
 - Purchase Control
- Facilities- Corrigo
- Patient Communication- Office Login
- Accounts Payable
 - DocStar- Invoice Approval
 - Concur- Submitting Expenses
- Accounting
 - Care Credit – take certification course
 - Regions One Pass
 - Transaction Central/Rectangle
- Marketing
 - Icebox
 - OnTrack
- Revenue Cycle
 - Dental Xchange or Integrated Clearinghouse
 - Insurance Company Logins
- Report Schedule
 - Monthly Recap Report
 - Days Scheduled Template
 - Daily Net Production Spreadsheet
 - End of Day H Drive
 - Supply Budget Worksheet
- Calendar Plan- Update per region

Conclusion of Day 15

- Review the last 4 days of learning – Q & A

Days 16 -19

Location: Mentor Office to Shadow

- Complete the Practice Manager- Combo Office test on LMS (If employee receives a score below 80%, review the Practice Manager Test Study Guide and have HR reassign the test)

Day 20

Location: Employee Home Office with Field Support Manager

- Complete the Practice Manager checklist (Located in HealthStream. The Field Support Manager & Regional Director should utilize this list to ensure all areas of the job position have been reviewed and discussed.)
- Finalize training- review responsibilities, address questions
- Review and sign the Completion of D4C Training Program document (Login ➡ My Employees ➡ Employee Information ➡ Select Employee ➡ HR Tab ➡ Training/Certifications ➡ Add new ➡ Select Training and upload document)
- **Regional Director- Please complete the checklist so the survey is sent; New Practice Manager- Please submit the survey from Survey Monkey within 5 days of completing training.**