

Operations Manager Training Outline

Pre Onboarding (at least 3 days before start date)

FSM calls OM 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 Operations 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**
 - Log into [HealthStream](#) (Login instructions are included in the 1st email sent from HS)
 - View the 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 (OM 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
- 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
 - [Operations Manager 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 OM 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 Operatory
 - 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

Days 4 - 6

Location: Employee Home Office 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)
- Software Training
 - Log into [HealthStream](#)
 - Take the course D4C Denticon Clerical Training
 - Tour of PMS
 - Tour of Icons
 - Tour of schedule and columns
 - Definitions of colors, types of appointments
 - Searching Existing Patients
 - Registering a New Patient
 - Patient Information
 - Guarantor/Responsible Party Information
 - Insurance Information
 - Medical 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

- Review the last 3 days of learning – Q & A
- Complete the Insurance Assessment on LMS (If the employee does not pass, print the copy from the H drive and review)
- 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 assessment)

Days 7 -10

Location: Employee Home Office with Field Support Manager

Review [Operations Manager Manual](#)

- Overview of Position Responsibilities
- [Best Practice Pediatric Strategies- Recare](#)
- [Best Practice Pediatric Strategies- Case Management](#)
- Best Practice Orthodontic Strategies
 - [Ideal Consult Version 1](#)
 - [Ideal Consult Version 2](#)
- Print [Reporting Playbook](#)
 - Schedule Planning
 - Scheduled Days
 - Production Report

- Supplies Budget Management
 - P&L Review
- Key Performance Indicators
- Human Resources
 - Staffing Ratio
 - Team Development
 - Team Evaluations
- 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 OM 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, GOS
 - Purchase Control
- Facilities- Corrigo
- Patient Communication- Office Login
- Accounts Payable
 - DocStar
 - 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 10

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

Days 11-13

Location: Mentor Office to Shadow

Days 14 -15

Location: Home Office with Field Support Manager

- Complete the Operations 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.)
- Complete the Operations Manager Assessment on LMS (If employee receives a score below 80%, review the Operations Manager Assessment Study Guide and have HR reassign the assessment)
- 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)
- **Regional Director - Please complete the checklist in HealthStream; New Operations Manager - Please complete the Training Team Survey in HealthStream**