NEW EMPLOYEE ONBOARDING

WORKBOOK & CHECKLIST

BeBetter
SEMINARS

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WELCOME!

Congratulations! You just found a new member of your dynamic team of dental professionals. This workbook serves as a checklist to go through in the process of training this individual.

Thank you for your time and participation today. I welcome and encourage you to continue the conversation with me at the contact information below.

Be happy, be healthy, and be better,

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CREATE EMPLOYEE FILE

Ask your new team member to bring the items below to their first day of work. Photocopies should be made, and a file created. This will also help with adding this employee to your payroll system.

- ☐ Driver's License
- ☐ Social Security Card
- ☐ Direct Deposit form
- ☐ Voided Check
- ☐ Completed W-4
- ☐ Completed I-9

- ☐ Dental License
- ☐ Radiology License
- ☐ TB Test Result
- ☐ Vaccination Record
- ☐ BLS Training Certificate

Along with the printed items above, you will want to add an employee grid to the file. This should be easily accessible, so that you can add to it often and conveniently.

You should add to the employee grid anytime your employees exercise anything remarkable, *good or bad.* Examples of both are below:

- Left early to attend to family
- Stayed late to help another team member
- Carelessly turned room over, leaving blood/saliva on commonly used surface
- Was rude to another team member, witnessed by others
- Walked patient out to their car when it was raining
- Etc.

Date	Name	Incident	Reprimand?

CLARIFY YOUR *PRACTICE IDENTITY*

Many offices have not already created the items below. If you are one of them, that's ok. If you take the time to create these items, do your best to make them relevant to the nuances and workflow of your office. Here are some tips in the creation of both.

MISSION STATEMENT

Determine the following:

- What makes your office different from others in the neighborhood?
- What unique skills and personal attributes do the doctors possess?
- What unique dental services does your office provide?
- What unique customer service do patients get to enjoy?
- What philanthropic efforts is your office is committed to?

For many offices, even after brainstorming the above, they can't think of anything that really sets them apart from any other office. This too is ok, but should be worked on in the future.

Please refer to the **Extraordinary Customer Service** *workbook*

OFFICE POLICY MANUAL

Policy regarding:

1. How to request time off
2. Benefits
   a. Discounted dental care
      i. For employees
      ii. For employee family and friends
   b. Retirement plan
   c. Medical Insurance
   d. Paid time off
   e. Paid holiday
3. Regular evaluations
4. Deficient performance
   a. What will get you a verbal warning
   b. What will get you a written warning
   c. What will get you fired
5. Location of regulatory manuals
   a. MSDS
   b. Radiation manual
   c. OSHA
   d. Bloodborne pathogen

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JOB DESCRIPTION

This is created specifically for the individual team member **based on their position.**

It should not include the very obvious primary description of their day-to-day expectations. For example, it is not necessary to include "thoroughly remove calculus" in a dental hygienist's training manual.

Instead, it should include the secondary responsibilities that are sometimes overlooked.

Examples include:

- Turning on/off the compressor and vacuum at the beginning/end of the day
- Cleaning out the lounge refrigerator
- Stocking and maintaining relevant paperwork (consent forms, treatment refusal, etc.)
- Communicating with dental equipment specialist if something doesn't work
- Restocking soap, paper towels at every sink
- Sterilizing the water lines
- Mopping the floors (sometimes needs to be done more often on snowy days)
- Sending spore test to regulatory facility
- Communicating with web and IT specialist when problems occur

THE MYRIAD OF "SMALL THINGS"

As you may notice, several of the ideas above are most often completed by a particular person in your office, despite there being no written establishment of that individual responsibility. This can be problematic when that person is absent, either temporarily or permanently.

The best way to determine the myriad of "small things" is to allow your current team to do the following:

- Take a sheet of paper
- Write down everything you feel like you do:
    - When you get to the office
    - When you prepare for the morning huddle
    - When you close up the office
    - When you have down-time
    - Weekly maintenance
    - Monthly maintenance
- Upon completing the above list, indicate:
    - When you generally have time to do it
    - How often you do it
    - Who else knows how to do it

TRAINING MANUAL

Your "on-boarding" packet should provide some of the 'nitty gritty' that, if left un-explained, can make your new team member bewildered and full of anxiety. These items (no matter what the position) often include:

- How to log on (username and password should be established **before** training)
  - Office computers
  - Practice management software
  - Imaging software
  - Inter-office communication software

- Room turnover protocol

- Room setup
  - Photo of perfect setup for many common procedures
  - Photo of bur block for common procedures
  - Printout with list of items needed for common procedures (mine is attached)

- Sterilization protocol

- Practice management software
  - How to schedule an appointment
  - How to execute simple charting
  - How to mark dental treatment as complete
  - How to create a lab slip
  - How to collect money and print a receipt

- Imaging
  - How to upload photos/radiographs to patient chart
  - How to download/print photos and radiographs
  - How to display photos/radiographs in op monitors

- Front Desk basics
  - New patient phone call script
  - How to request an insurance fax-back
  - Treatment plan presentation script
  - How to check in a regular patient
  - How to check in a new patient

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TRAINING CHALLENGE

Ideally, the training manual should be accompanied by a "challenge" of some sort. This challenge should be:
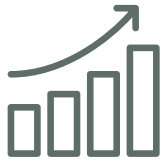
Measurable

Time-Limited

Relevant
to the specific nature
of the position

For example, in my office, every dental assistant needs to be comfortable performing the following unique duties:

- Intraoral photos
- Full arch impressions
- Triple tray impressions
- Extraoral photos
- Verbally delivering surgery consent and post-op instructions
- Creating lab slips
- Taking a CBCT

Notice, none of the obvious stuff is listed above. There is no need to challenge a dental assistant to learn how to set up a room, provide chair-side assistance, or sterilize instruments.

EXAMPLE TRAINING CHALLENGE

Skills to work on in next 4 weeks

Intraoral photos (20) ○

Full arch impressions (2) ○ ○

Triple tray impressions (6) ○ ○ ○ ○ ○ ○

Extraoral photos (20) ○

Photo uploads (20) ○

Surgery consents (10) ○ ○ ○ ○ ○ ○ ○ ○ ○ ○

Surgery post-ops (10) ○ ○ ○ ○ ○ ○ ○ ○ ○ ○

Lab slips (5) ○ ○ ○ ○ ○

CTs (5) ○ ○ ○ ○ ○

TRAINING CHALLENGE

The same set of challenges can be posed to:

DENTAL HYGIENISTS

- Explain periodontal disease to a patient
- Chart existing dental treatment in practice management software
- Chart periodontal charting in practice management software
- Take CBCT
- Take intra/extra oral photos
- New patient interview questionnaire
- Emergency patient interview questionnaire
- Take full arch impressions
- Upload and display patient images

FRONT DESK ADMINISTRATIVE TEAM

- New patient phone call
- Emergency patient phone call
- Recall patient phone call
- Insurance fax back
- New patient check-in
- Enter insurance coverage information
- Accept payment
- Accept insurance payment and EOB
- Review a patient ledger
- Generate aging report and communicate unpaid balance to patient
- Present a treatment plan

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