

Office Manager Training Plan

Packet includes: 30/60/90 game plan, positions checklist & scorecard

Job Description: works hard to keep the office running in a smooth, effective and efficient manner, focus on growth in the practice to ensure the business is profitable while providing appreciation to all team members.

Goal: to be fully trained as an office manager, taking on all duties and tasks within 90 days post-employment start date.

*****Note text in RED on scorecard BELOW and remove prior to printing a copy to give to the employee.**

Office Manager Checklist – 30/60/90 Day Plan to Be Proficient In

1. Overall office duties
2. Lead morning huddle
3. Run and track all reports efficiently
4. Close out office
5. Schedule Prep

What each task includes:

- **Overall Office Duties**
 - Arrive 30 minutes prior to first patient
 - Spot check all EOD forms
 - Check office facility to ensure all things are tidy and clean
 - Review schedule for any conflicts
 - Confirm all lab cases in
 - Meet with Dr. prior to morning huddle
- **Lead morning huddle and begin and end on time**
 - Ensure each team member is participating fully
 - Ensure that:
 - Same day treatment is mentioned and noted; anything not completed in patient treatment plan is discussed
 - Recare is noted and accountability with team members set
 - Balances are discussed with accountability in place
 - WINS for the office are highlighted daily
 - Announcements
- **Tracking**
 - Production
 - Collections
 - Reappointment percentages
 - Attrition
 - Case acceptance
 - Same day treatment

- New patients and referrals
- Broken appointments
- Unconfirmed appointments 2 days out
- AR Reports – 30, 60, 90 days
- Hygiene production (3x pay?)
- Evaluate refunds
- Online reviews
- Report office numbers from front office
- Keeping team on task
- Ensuring team members are clocking in and clocking out
- Lunches are taken by all team members
- **Close Out Office**
 - All EOD forms completed by team members
 - Ensure all lab cases sent out
 - Make bank deposits
 - Ensure that all payments are posted correctly
- **Schedule Prep**
 - Smooth flow
 - Hitting goals – scheduled to production
 - No holes in hygiene
 - Unconfirmed appointments

Weekly Duties:

- Hold productive weekly team meetings
- Set weekly goals
- **Track:**
 - Weekly production and collections – are we on track to hit goals?
 - Set goals for the next week to ensure that office is on track
 - Weekly case acceptance, attrition, and reappointment percentages
 - Provider's hourly income
 - Recall list and hygiene openings – address and fix weekly
 - Aging for patient and insurance accounts – weekly reporting
 - Follow up on claims
 - Confirm claims are paid
 - Pre-determinations follow-up
 - Referrals – tracking marketing ROI

Monthly Duties:

- Close month out by the 5th of every month
- Ensure statements are sent

- Perform monthly team evaluations of each team member
 - Set new goals
- Evaluate each department:
 - Where did they excel?
 - Where do they need to improve?
 - Set 1-3 goals for each department for following month
- Determine what area of the office needs focus for next month
- Set personal goals to help each team member reach goals
- **Track and evaluate:**
 - Supply and lab budget
 - Overhead
 - Monthly production and collections – did we hit goals?
 - Monthly treatment case acceptance
 - Monthly attrition
 - New patients and referral sources
 - Hygiene department
 - Active patient base
 - Aging for patient and insurance accounts
 - Confirm and follow-up on claims
 - Referral sources
- ROI of marketing budget
- KPIs – compare to last year
- Set budgets for next month

Quarterly Duties:

- KPIs – evaluate how compared to last year
- Team evaluations – raises?
- Team building for positive office culture
- Update office manual quarterly

Additional Duties:

- Payroll
- Office payments
- Ensure employees clock in and clock out
- Ensure office growth
- Train team members
- Keep personnel records current:
 - Attendance
 - Performance evaluations
 - Interview forms

- Disciplinary actions
- Weekly and monthly team meetings
- Fee schedules updated each year in January
- Ensure OSHA standards are current
- Run computer back-ups monthly
- Setting up computer software
- Passwords for all team members on computer software
- Hiring:
 - Assure that all necessary paperwork and forms are filled out and establish permanent employee file
 - If applicable, track new employees performance for "trial period" and be prepared to assist in the decision to offer permanent employment or termination
- Firing:
 - In the event of employment termination, conduct exit interviews and document all relevant information and place in file
- Coordinate team schedules and vacation requests
- Coordinate continuing education for each team member
- Coordinate office uniforms and dress code

*****Note text in RED on scorecard and remove prior to printing a copy to give to the employee.**

HUDDLE:

15 minutes start time prior to the first patient.

CLOCKING IN/OUT:

You may start to clock in 15 minutes PRIOR to the huddle.

You must clock out as soon as you are done cleaning up after your last patient. The maximum is 40 minutes after your last scheduled patient.

ATTIRE:

Scrubs – navy blue, black, or grey.

PARKING:

There is only street parking available for employees. You may not park under the building, or in front of the building. You may only park across the street, or past the parking lot towards county road.

Prior to start of employment:

#	TASK	COMPLETED
1.	Complete all HR Documentation/New Hire Documents with Office Manager	
2.	Acquire Eaglesoft Login Credentials	
3.	Receive a tour of the Facility by the Director of 1st Impressions	

#	TASK	COMPLETED
4.	Understand our Core Values, Mission and Vision of our company	
5.	Familiarize yourself with our Website and the Dr. Bios from the Website	
6.	Read the Team Bios to learn about your Teammates	
7.	Acquire agenda for Morning Huddle organization	
8.	Print out copy of 30-60-90 day Onboarding Process Checklist, bring to work each day	

Bring a smile and a positive attitude to your first day and every day following!

30 DAY ONBOARDING CHECKLIST			
TASKS	Coaching Date	Completed	Rating (Scale of 5)
Clock in/out.			
Arrive 30 minutes prior to first patient.			
Spot check all EOD forms.			
Verify that all unnecessary items are put away from counters, desktops, etc and are in appropriate storage locations.			
Review schedule for any conflicts.			
Confirm all lab cases came in.			
Meet with Dr. prior to morning huddle.			
Keep track of online reviews.			
Accurately perform payroll activities.			
Track all office payments.			
Ensure employees clock in and clock out.			
Ensure office growth.			
Train team members.			
Ensure lunches are taken by all team members.			
Oversee that all EOD forms completed by team members daily.			

Keep personnel records current.			
Ensure all lab cases were sent out.			
Make bank deposits.			
Close out the office – ensure correct deposits and payments.			
Ensure statements are sent.			
Create team building for positive office culture.			
Update office manual quarterly.			
Run computer back-ups monthly.			
Coordinate office uniforms and dress code.			
Create passwords for all team members on computer software.			
Coordinate team schedules and vacation requests.			
Coordinate continuing education for each team member.			
Understand Where:			
TASKS	Coaching Date	Completed	Rating (Scale of 5)
Dirty laundry goes.			
Medications are kept.			
Emergency Medical Kit Location.			
Defibrillator Location.			
Garbage / Paper Recycling location.			
Stock Room and Supply location.			
Understands the AM, Downtime, and End of Day Protocols.			
Transitioning an Office.			

___ Questions ___ x 5 = ___ Score minimum ___ (75%)

The Dental A-Team has created a team training video bank specifically for our office managers. We recommend following the link here:

<https://www.thedentalateam.com/products/team-training-videos/categories/946654/posts/3116444>

After viewing the videos, please complete the scorecard and assessments as attached in the online outline.

Video Title	Watched Video	Roleplayed With Team Member on Date	Rating on Performance
What should an Office Manager Do			
Leadership			
Management vs Dictatorship			
The art of silence			
Team Leads			
Accountability			
Delegation			
Morning Huddles			
Team Meetings			
Hitting goals			
Setting Goals			
Cadence for reporting			
Reports to Run			
KPI Reports			
AR			
How to Grow your Practice			
Hiring			
Firing			
Onboarding			
Asking for reviews			
Meeting topics			
Meetings			
Monthly evaluations			
Quarterly reviews			
Motivating teams			

Video Title	Watched Video	Roleplayed With Team Member on Date	Rating on Performance
Team Building Ideas			
Team Engagement			
Production goals			
What does Ideal Mean?			
Operations Manual			
Time Journaling			
Complete Ops Manual Under 3 Months			
Org Chart			
Positions of the Practice			
Reality Vs. Perception			
Role playing			
Referral Programs			
Website reviews			
Setting up a Membership Plan			
NDTR, Your Life Line			
Route Slips with NDTR			
Sample Morning Huddle			
Using 30-60-90 Assessments			
Using 30-60-90 Evaluation			
Scorecard – Phone Skills			

60 DAY ONBOARDING CHECKLIST			
TASKS	Coaching Date	Completed	Rating (Scale of 5)
Do all 30-day tasks with no supervision.			
Lead morning huddle and begin and end on time.			
Ensure each team member is participating fully in			

morning huddles.			
Make sure WINS for the office are highlighted daily.			
Perform all tracking and reports: production, collections, reappointment percentages, etc.			
Accurately evaluate all reports.			
Keep track of hygiene production.			
Evaluate and perform refunds.			
Report office numbers from front office.			
Perform the ROI of marketing budget.			
Ensure all OSHA standards are current.			
Compare KPIs to last year.			
Set budgets for the next month.			

___ Questions ___ x 5 = ___ Score minimum ___ (75%)

90 DAY ONBOARDING CHECKLIST - Fully Competent in:			
TASKS	Coaching Date	Completed	Rating (Scale of 5)
Performs all 30 + 60-day tasks with no supervision.			
Asking for Referrals (Referral program), Reviews (Google / Yelp / Facebook).			
Displays confidence with TEAM, Dr's and Patient Communication.			
Morning Huddle numbers, Full Preparation, Looking for same day / added treatment opportunities.			
3rd Party Endorsing / Edification.			
Successfully keep the team on task.			
Hold productive weekly team meetings.			
Set weekly and personal goals for team.			
Close month out with little to no errors by the 5th.			
Perform monthly evaluations – set new goals.			

Evaluate each department – pinpoint improvements and achievements.			
Determine what area the office needs to focus on to excel.			
Ensure the fee schedules are updated each year in January.			
Perform hiring protocols.			
Perform firing protocols.			
I have completed the Office Manager training videos provided by The Dental A-Team (see the link below).			
I've completed the scorecard and assessments as attached in the online outline of the videos.			

___ Questions ___ x 5 = ___ Score minimum ___ (75%)

Goals established based on performance over the past 90 days (Doctor / Office Manager to assist in this process).

Setting S.M.A.R.T. Goals (*Specific, Measurable, Achievable, Realistic, Timely*)

GOALS:

- 1.
- 2.
- 3.
- 4.
- 5.