30 Day Training Checklist

Employee Name:

Employee Start Date:

Estimated Completion:

		Start	Completed	Notes
Opening				
	Remove forwarding of office phone from cell phone			
	Login to iPad			
	Turn on TV,put on DVD setting, DVD will automatically start playing			
	Turn on computer and log in, turn on keyboard & mouse			
	Log into Practice Management Software & email (go through new email)			
	Morning meeting is at 8am sharp. Be present and prepared			
Closing				
	ALL claims are sent to batch			
	Checks to Batch			
	Credit Card to Batch			
	Organize Receipts			
	Pick up cash box & iPad, (name) will lock it.			
	Turn off computer, keyboard, mouse, & TV			
	Transfer phones to Office cell			
	Turn off lobby light & lock door on the way out			
Understanding standard of care-Read Documentation				
	How does Dr treat patients			
	Defining: Active Patient vs. inactive			
	Who are our patients, demographics			
	Exams, X-rays			
	Hygiene			
Phones				
	Voice Mail, returning calls & taking messages			
	Answering the phones, fielding calls, gathering information			
Software				
	The Modules, what they are and why we use them			
	The appointment book or scheduler			
	The account or ledger			
	The clinical chart			
	Digital Images			
Communication				
	Handoffs			
	Verbal Skills			
	Checking the office email			
Confirming Appointments				
	Using Communication Software (SolutionReach) & phone			
	Make calls/texts to confirm appts if patients have not confirmed through SR yet, starting two days prior to appt. Documentation of any conversations or messages left.			
Patient Arrival				
	Checking patients into the software and alerting the team of arrival			
	Prepare consent forms & acquire signatures			

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	Financial Policy for New Patients			
Scheduling				
	Doctor			
	When and where			
	Hygiene			
	Prophy Vs. Perio			
	New patients			
	NP forms & signatures			
	Emergency Patients			
	Identifying what is an emergency patient			
	New (forms)			
	Existing			
	Documentation			
	Referring Patients out			
	Block scheduling			
Recare				
	Contacting the patients			
	Documentation			
Finsihing Appointment				
	What to collect			
	Reviewing Tx completed & Presenting anything new			
	Confirm the next visit date w/ the hygienist & patient			
	Submitting the e-claim, attachments			
Patient Financials				
	Financial Policy (NP's & Existing Patients)			
	Collecting same day			
	Verbal skills			
	Past due accounts & how do we handle them			
Scanning documents				
	Scan important files immediately			
	NP paperwork, referrals, etc.			
	Scan ins payment/EOBs can be scanned at end of day and uploaded to pt’s files			