

# Training Schedule for Business Team Members

## Week 1

1. Complete tax and other employment forms.
2. Read the office manual. Note any questions for clarification and discuss with the office administrator.
3. Learn names and responsibilities of other staff members.
4. Observe and learn:
  - a. Patient flow; patient reception and dismissal
  - b. Methods of communication with patients at the desk, on the telephone, and via email.
  - c. Handling of incoming telephone calls for the dentist and other staff members
  - d. Computer system
  - e. Division and overlap of duties between front desk personnel
  - f. Work closely with the office coordinator and the dentist to understand duties

## Week 2

1. Reinforce items from Week I
2. Learn methods of scheduling
3. Learn recare system
4. Continue computer training
5. Learn to check patients in and out
6. Begin to learn charting method
7. Learn HIPPA and OSHA requirements and regulations

## Week 3

1. Reinforce items from Weeks I and II
2. Learn to post payments over the counter, mail, and electronic
3. Learn to close computer for end of day reports
4. Learn to make bank deposits
5. Begin to learn dental terminology

## Week 4

1. Reinforce items from Weeks I, II, and III.
2. Learn procedures for filling insurance and Medicaid and other managed care claims
3. Begin scheduling patients
4. Learn method of billing and aging accounts receivable
5. Learn names of support personnel: lawyer, accountant, janitor, sales representatives, etc.
6. Learn about correspondence needs of the dentist and the office in general
7. Learn about statistics kept by the practice

## Week 5

1. Reinforce items from Weeks 1, 2, 3 and 4.
2. Become proficient in CPR. Enroll in a class if training is needed.
3. Meet with office coordinator and dentist to review training and plan for additional needs.
4. Learn office emergency procedures (medical, weather, fire).

A written training schedule will give new team members a sense of direction. This training schedule is meant to be an outline only. The outline must be customized for each practice, realizing that thorough training may take longer than 5 weeks.