

Office Manager Training Plan

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

Job Description: The office manager's responsibilities include keeping the office running smoothly and efficiently. Additional focuses includes achieving growth and profitability benchmarks while embracing the core values and positive culture of the practice.

Goal: Become fully trained as an office manager, mastering all duties and tasks assigned within 90 days post-employment start date and during the duration of employment.

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 that common areas and departments are organized and cleaned.
 - Review schedule for any conflicts and opportunities
 - 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 prepared and read to participate
 - Ensure that:
 - Same day treatment is prioritized and planned for
 - Recare opportunities are noted and accountability and expectations with team members is reinforced
 - Balances are discussed with accountability for collecting is 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
 - Perio percentage
 - Percentage of active patients active in the hygiene department

- Online reviews
- Report office metrics and KPI's from front office
- Keeping team on task
- Ensuring team members are clocking in and clocking out
- Lunches and breaks 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
 - Achieving benchmarks- scheduled to production
 - Minimal voids in hygiene schedule
 - 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 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- year over year comparison
- Set budgets for next month

Quarterly Duties:

- KPIs- year over year comparison
- 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

Office Manager Scorecard

30 Day Goals _____

Date for review:

Rate the following statements – 1 being strongly disagree, 5 being strongly agree

Clock in/out.

1 2 3 4 5

Arrive 30 minutes prior to first patient.

1 2 3 4 5

Spot check all EOD forms.

1 2 3 4 5

Verify that all unnecessary items are put away from counters, desktops, etc and are in appropriate storage locations.

1 2 3 4 5

Review schedule for any conflicts.

1 2 3 4 5

Confirm all lab cases came in.

1 2 3 4 5

Meet with Dr. prior to morning huddle.

1 2 3 4 5

Keep track of online reviews.

1 2 3 4 5

Accurately perform payroll activities.

1 2 3 4 5

Track all office payment.

1 2 3 4 5

Ensure employees clock in and clock out.

1 2 3 4 5

Ensure office growth.

1 2 3 4 5

Train team members.

1 2 3 4 5

Keep personnel records current.

1 2 3 4 5

Ensure lunches and breaks are taken by all team members.

1 2 3 4 5

Oversee that all EOD forms completed by team members daily.

1 2 3 4 5

Ensure that all lab cases were sent out.

1 2 3 4 5

Make bank deposits.

1 2 3 4 5

Close out the office - ensure correct deposits and payments.

1 2 3 4 5

Ensure statements are sent.

1 2 3 4 5

Create team building for positive office culture.

1 2 3 4 5

Update office manual quarterly.

1 2 3 4 5

Run computer back-ups monthly.

1 2 3 4 5

Create passwords for all team members on computer software.

1 2 3 4 5

Coordinate team schedules and vacation requests.

1 2 3 4 5

Coordinate continuing education for each team member.

1 2 3 4 5

Coordinate office uniforms and dress code.

1 2 3 4 5

Areas I feel I excel:

Areas I feel I need extra help on:

Goal for next 30 days: _____

60 Day Goals _____

Date for review: _____

Rate the following statements – 1 being strongly disagree, 5 being strongly agree

Perform all 30 day tasks with no supervision.

1 2 3 4 5

Lead morning huddle and begin and end on time.

1 2 3 4 5

Ensure each team member is participating fully in morning huddles.

1 2 3 4 5

Make sure WINS for the office are highlighted daily.

1 2 3 4 5

Perform all tracking and reports: production, collections, reappointment percentages, etc.

1 2 3 4 5

Accurately evaluate all reports.

1 2 3 4 5

Keep track of hygiene production.

1 2 3 4 5

Evaluate and perform refunds.

1 2 3 4 5

Report office metrics and KPIs from front office.

1 2 3 4 5

Perform the ROI of marketing budget.

1 2 3 4 5

Compare KPIs to last year.

1 2 3 4 5

Set budgets for the next month.

1 2 3 4 5

Ensure all OSHA standards are current.

1 2 3 4 5

Areas I feel I excel:

Areas I feel I need extra help on:

Goal for next 30 days:

90 Day Goals

**Date for
review:**

Rate the following statements – 1 being strongly disagree, 5 being strongly agree

Perform all 30 and 60 day tasks with no supervision.

1 2 3 4 5

Successfully keep the team accountable for their individual responsibilities. .

1 2 3 4 5

Hold productive weekly team meetings, utilizing agenda.

1 2 3 4 5

Set weekly and personal benchmarks for team.

1 2 3 4 5

Close month out by the 5th with minimal errors.

1 2 3 4 5

Perform monthly evaluations - set new benchmarks.

1 2 3 4 5

Evaluate each department - pinpoint improvements and achievements.

1 2 3 4 5

Determine what area the office needs to focus on to excel.

1 2 3 4 5

Ensure the fee schedules are updated each year in January.

1 2 3 4 5

Perform hiring protocols.

1 2 3 4 5

Perform firing protocols.

1 2 3 4 5

Areas I feel I excel:

Areas I feel I need extra help on:

Goal for next 30 days:
