

# Castle Peak Dental & Avon Dental

## UNIVERSAL TRAINING BINDER

Universal Training Instructor (UTI) to train on all universal systems applicable to all team members.

**Goal for Training:** Our goal is for every team member to have both increased value in the marketplace, as well as increased personal growth within 90 days.

The goal for this Universal Training is to give each new team member the same foundational principles and protocols that will be built upon over the next 90 days.

### **How to use this manual:**

This manual is printed to follow along for training. It is also located in the google drive for [cpdental1116@gmail.com](mailto:cpdental1116@gmail.com). When using on the google drive, it has hyperlinks to a specific document per item.

Send to: [cpdental1116@gmail.com](mailto:cpdental1116@gmail.com)

### **DAY 1 TRAINING**

- HR with Debbie Dodson, Practice Director
  - Org Chart
  - Core Values: Memorize by end of the week <https://docs.google.com/document/d/12DkosO-Dnq2mUPvIyg3kOqC8g2rXMmly2OYbRakASkk/edit?usp=sharing>
  - Mission statement: Memorize by end of the week [Mission Statement](#)
  - Motto for the year: Memorize by end of the week
  - Add new employee to Slack: Expectations for communication
    - Departments have communication tools (Slack, Text)
  - [FAQ's](#)
  - Give new employee Open Dental login information
    - Debbie will clock employee in; UTI will show employee how to clock in
  - Give employee contact list

- Rules of Engagement: COMISSION/OMISSION [commision omission.docx](#)
- [CORE VALUES & MISSION STATEMENT](#)
- Office Tour
  - Waiting Room  
<https://youtu.be/aOKe98DMXNg>
  - Kitchen/Break Room
    - Responsibilities and expectations
    - Snacks
    - Team meeting area/Whiteboard
    - Accountability Quick Hits
    - Where to find information
  - Supplies
    - Office Supplies
      - Where to find
      - Where do I note supplies needed
      - Who orders?
    - General Cleaning Supplies
      - Where to find
      - Where do I note supplies needed
      - Who orders?
    - Dental supplies
      - Where to find
      - Where do I note supplies needed
      - Who orders?
    - Bins
      - Nightly Check off
  - Meet people in office and point out the DH's
- Meetings (Meetings Handout)
  - Yearly Big Wig
  - Monthly Big Wig
    - [Big Wig Explanations](#)
  - [KPI's](#)
    - Form to be completed
    - Where to find info/calculations
    - DH to guide new member before monthly meeting (2 times)
  - Weekly [Account Meetings](#)
    - Sheet to be filled out
    - Expectations
    - Check in Day before
    - During the first 30 - 60 days of training, you will be observing these meetings and getting acclimated to the cadence, participation and

- reporting
    - When you begin to understand, you will be asked to report on your KPI's and even facilitate a meeting
- 30/60/90 --UTI needs to set up in OD and tell team member to set in their own personal calendars with reminder one week ahead to prep
  - DH must discuss these during next step if position is front desk position  
[CP SC Hygiene Coordinator & Team Culture Assessment Revised Aug 2019](#)
- [Performance Development Program \(PDP\)](#)
- [Scheduling Coordinator Tier Sheet](#)
- [Job Packet Review by DH](#) (give a 2 hour time block planned in first week)  
[Non Negotiable FO.docx](#)
- [Glossary of Terms.docx](#)
- [Dentition](#) (if applicable)
  - Review each day and skills test or quiz
- Computer Tour
  - How to log in to computers
  - Open Dental
    - Change OD temp password
    - [How to clock in/out](#)
  - Where to find files: Shared S drive
    - General HR Forms
    - [Front Office: UTI will show where, DH will review forms](#)
  - [Google Docs](#)
  - BlueNote
  - Email (if applicable) [Emails Front Office](#)
    - Expectations and Responsibilities
  - [Checklists](#)
    - Where to find
    - Who does it go to?
    - When and where do I hand in?
- Schedule Overview
  - Providers on what days
  - Days and Hours
- Questions/Review?
  - [Training Checklist](#) (checklist for use during training)

## TRAINING DAY 2

[Mission Statement & Core Values](#)

## Review Yesterday's Topics/ Questions

- [Flex](#)
  - How to sign in
  - Where to charge tablets
  - How to use
- New Patient Forms
  - Where to find
    - Shared Drive/ Front Office/ New Patient Forms
  - Review each form
  - How/Where to enter
- Open Dental Basics
  - [Open Dental Appointment Module](#)
  - Search patients
  - How to add patients
  - Schedule
    - How to flip days/week
  - Schedule Overviews
    - Columns
    - Times
    - Blockouts
  - Skills check/quiz
- [IT Support](#)
  - Company Name: Blacksteel
  - Website for support needed
  - How to create a ticket

## Departmental YouTube Videos

<https://youtu.be/XC5ukJLQ4T4>

<https://youtu.be/JU4bFssC0ho>

<https://youtu.be/XBQAQnhdw6Q>

[https://youtu.be/Gi\\_FRZAWOW8](https://youtu.be/Gi_FRZAWOW8)

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- Phones
- How to Answer
  - Tone and verbiage
- How to use
  - Hold - Verbiage
  - Transfer
- How to check voicemail
  - Email/ Phone

- Documentation
- Expectations and responsibilities
- [Unique Dental Scheduling](#)
  - Expectations
  - Log In
- Document! Document! Document!
  - Comm Log
  - Appointment Notes
- Review/ Questions
- Complete Training Checklist

### TRAINING DAY 3

#### [Mission Statement & Core Values](#)

Review Yesterday's Topics/ Questions

- [Appointment Module](#)
- [Commonly Used Abbreviations](#)
- Procedures Breakdowns Categories
  - Perio/Oral Surgery/Exams/Xrays/Dentures
  - Codes
    - How to look up in computer
    - ADT code book
- Fee schedules
  - How to look up fees
- [LOYALTY MEMBER PROGRAM \(NEW\) /Dental Savings Plan](#)
  - Overview and brochure
  - Presentation and verbiage
  - How to add
- [Hygiene Appointments](#)
  - What hygienists can do
  - Lengths
  - Prophy vs Periodontal Maintenance
- Assistant Appointments
  - What Assistants can do

Open Dental Modules specific to position and department

- Have modules ready for them to go through

- Review and skills check from modules
- Departmental videos
  - Review and skills check from videos
- Questions specific to their department

#### 10. Reviews/Questions

#### 11. Complete Training Checklist

### TRAINING DAY 4

#### Mission Statement & Core Values

Review yesterday's topics/questions

- Insurance for patients
  - Where to find general insurance information
  - Basics of insurance: How applicable to your position
  - Where to find patient specific insurance information
  - Insurance Eligibility Form
  - Handout for insurance
- [Verrific](#)
  - Insurance Verification
  - Portal
- Schedule
  - Appointments for Doctors
    - Types
      - Treatment
      - Limited exam or emergency
      - Re-evaluation
- Insurance Plans
  - How to search
  - How to add insurance plants to a family
  - Subscriber vs. patient
- Insurance Breakdown
  - Scheduled time with Allison
- Payment Options
- Dexis:
  - Xrays and intraoral photos
  - How to export
  - How to import

- Scheduled time with other DH's or videos
- Common phrases/tactics used
  - Case Acceptance percentage (appt % vs \$ %)
  - Off track/on track
  - others??

Open Dental Modules specific to position and department

- Modules ready for them to go through
  - Review and skills check from modules
- Departmental videos
  - Review and skills check from videos

10. Recite core values, mission statement and motto for the year

11. Questions/reviews?

12. Complete Training Checklist

## **TRAINING DAY 5**

### Mission Statement & Core Values

UTI reviews previous week, reviews OD basics, and quizzes

Core values, looking at schedule (first 2 hours)

If clinical position: DH now reviews more of the upcoming week training protocol

- OD specifics
- insurance specific questions to that position
- prep T.M. for upcoming patient (what does that look like for shadowing of the DH?, need to ensure time to watch new team member for first 1-2 weeks closely)