

FrontOfficeAcademy
By Dental Success Network

New Hire Onboarding

A 12-week plan for every new hire, front desk to clinical, that runs alongside position training.

Practice name		**Team member**	
Role		**Start date**	
Trainer or buddy		**Onboarding trainer**	
Manager			

Small office? One person can fill more than one of these.

Built to be edited

Type right into the blanks in this PDF, skip anything that does not apply to your practice, then share it with each new team member.

Want to add or remove tasks? Get the editable version

Created by Front Office Academy

How to use this workbook

This workbook gives you a plan for every new hire's first 12 weeks. It covers recurring meetings, setting up work devices and accounts, the culture you want your team to learn, and a 12-week path from shadowing to full ownership. Fill in your practice's details once, then save that version as your master copy before adding anyone's name. Make a fresh copy of the master for each new hire.

What is new hire onboarding?

New hire onboarding is what everyone you hire goes through, no matter their role. Some practices assign one person, an onboarding trainer, to take every new hire through the same steps: paperwork and required training, logins and systems, your mission and values, meeting the team, how meetings and communication work, and what you expect from everyone. Once that's done, the new hire moves to their department lead for position training, ready to learn the job instead of how the office works. The basics happen in the first few days. Position training starts right after and runs alongside the rest of this plan.

If you are the owner or office manager

1. Complete Part 1 before the first day, so accounts and meetings are ready.
2. Fill in Part 3 with your practice's values and team members.
3. Customize the 12-week plan in Part 4 with real trainers and dates.
4. Check in on each phase, and sign off in Part 5 at Week 12.

If you are the new team member

1. Finish the setup checklist and assessments in Part 2 on day one.
2. Read Part 3 to learn what the practice stands for.
3. Work through each phase of the plan in Part 4, checking off tasks as you go.
4. Review your responsibilities in Part 5 with your manager.

Your first 12 weeks at a glance

WEEKS 1–2 Orientation & Shadowing	WEEKS 3–4 Guided Practice	WEEKS 5–8 Doing It Yourself	WEEKS 9–12 Owning It
Learn the tools, meet the team, and watch how recurring tasks are done.	Try tasks yourself while a trainer reviews each step.	Run recurring tasks on your own, with regular check-ins.	Own your recurring tasks and take on new ones without supervision.

What's inside

- **Part 1, Before Day One:** recurring meetings, helpful resources, and the accounts and paperwork checklists.
- **Day One Agenda:** a full plan for the first day.
- **Part 2, Day-One Setup:** logging in to your tools and taking the DISC assessment and appreciation quiz.
- **Part 3, Our Practice:** your mission, values, team, and what you look for.
- **Part 4, The 12-Week Plan:** four phases with training sessions, tasks, and check-ins.
- **Part 5, Ongoing Responsibilities:** what every team member owns after 12 weeks, plus the sign-off.

Part 1: Before Day One

FOR THE MANAGER

Set these up before the new team member arrives, and fill in the blanks as you go.

Recurring meetings

Meeting	Days	Time	Location or link	Format
Morning huddle				Attend every day. At first, listen and learn how the day is planned. Over time, prep and share your part of the schedule.
End-of-day check-in (optional)				A trainer is available to answer questions and go over anything from the day.
Team meeting (weekly or biweekly)				Attend from week one to see how the team works. Over time, come prepared with updates and ideas.
Monthly one-on-one review				Meet with your manager to review progress, goals, and where you need support. Bring your own questions.

Paperwork and required training

	Item	Completed by	Date
☐	Signed offer letter		
☐	Form I-9, employment eligibility		
☐	Form W-4, plus your state's withholding form if it has one		
☐	Direct deposit form		
☐	Emergency contact form		
☐	Signed employee manual acknowledgment		
☐	Signed confidentiality agreement		
☐	HIPAA privacy and security training		
☐	OSHA training that applies to the role, such as bloodborne pathogens and hazard communication		
☐	Clinical roles: Hepatitis B vaccine offered, or declination signed		
☐	Clinical roles: CPR and radiography certifications checked, if your state requires them		
☐	New hire reported to your state's new hire registry		

Requirements vary by state and by role. Check with your state, your payroll provider, or an HR professional to confirm what applies to your practice.

Helpful resources

Resource	Link or location
Password manager or login instructions	
Employee manual and office policies	
Practice playbook or SOPs	
Training videos folder	
Who to ask for help, and how to reach them	

Don't have one of these yet? Leave it blank and write down who knows the answer.

Onboarding checklist: accounts and access

	Account or access	Completed by	Date
☐	Welcome email sent with your core values and mission		
☐	Link to the employee manual shared		
☐	Whole team, doctors included, told who's starting, in what role, and what to expect in their first weeks		
☐	Work email assigned, if you provide one		
☐	Practice software login created		
☐	Imaging or charting login, if needed		
☐	Phone extension and voicemail set up		
☐	Time clock and payroll login created		
☐	Patient messaging tool login, if needed		
☐	Team chat or task list, if you use one		
☐	Shared drive or folder access to the playbook		
☐	Other: _____		

FOA TIP

Mistake to avoid: Not telling the team

It's easy to assume everyone knows someone new is starting. Tell the whole team, doctors included, who's coming, what role they'll fill, and what to expect from them in their first weeks.

Day One Agenda

Fill in the times to fit your schedule. The goal is a full, planned day, so your new team member never stands around waiting.

Plan ahead
Schedule a new hire's first day on a slower day, and block real time on the trainer's and manager's schedules.

Time	What happens	Who's responsible
Day before	Send a note with where to park, what to wear, and what time to arrive	Manager
	Welcome at the door, show them where to put their things, and introduce them to whoever is in	Manager
	Sit in on morning huddle and get introduced to the team	Manager
	Office tour: every room front to back, including the break room, exits, and the emergency kit	Trainer
	Finish any paperwork from Part 1 not done before day one. Clinical roles: bloodborne pathogens training comes before working chairside.	Manager
	Day-One Setup: logins and systems from Part 2	Trainer
	Watch patient flow from check-in to checkout	Trainer
	Lunch with the team	Manager plans it
	DISC assessment and appreciation quiz from Part 2	New team member
	Position training preview: walk through the role's training plan and the first two weeks	Trainer
	Shadow someone in their role for the rest of the afternoon	Trainer or department lead
	15-minute end-of-day check-in: what went well, questions, and what's tomorrow	Manager

FOA TIP

Mistake to avoid: Skipping to position training
When the schedule is full, it's tempting to go straight to job skills, but a new hire who doesn't know how the office runs can't focus on learning the role. Cover the basics first, then hand them to their department lead with a training plan ready.

Part 2: Day-One Setup

FOR THE NEW TEAM MEMBER

Work through this page on day one, and skip anything your practice does not use.

> **The same first step for most systems**
> Use the login your manager gave you, then set your own password. Use your own login for any system that holds patient information, and never share passwords.

Setup checklist

	System	What to do
☐	**Practice software** Dentrix, Eaglesoft, Open Dental, etc.	Log in, set your own password, and tour the schedule and patient chart.
☐	**Imaging and charting tools** If your role needs them	Get a login, and learn where x-rays and photos are saved.
☐	**Phone and voicemail**	If your role has one, set up your extension and voicemail, then practice a call transfer.
☐	**Time clock and payroll**	Set up your login, and learn to clock in and out and request time off.
☐	**Patient messaging tools** If your role needs them	Log in to the tool used for text reminders and patient messages.
☐	**Work email** If your practice provides it	Sign in with the address you were given and set your own password.
☐	**Team chat or task list** If you use one	Log in, update your name and photo, and learn how the team shares tasks. If you use a whiteboard or paper list, ask where it lives.
☐	**Other tools**	Write each tool's name and where to log in: _____
☐	**Dentistry 101** If you're new to dentistry	New to dentistry? Watch the **first Dentistry 101 video** from Front Office Academy.

Assessments

These help your manager understand how you work, so training and teamwork can fit your style.

☐ Take the **free DISC test** or your practice's version, then share the results with your manager.

☐ Take the **appreciation quiz** and share your results with your manager.

Part 3: Our Practice

FOR THE MANAGER

Help your new team member understand what the practice stands for and who they will work with. Fill this in before day one and talk it through together.

Foundational principles

Core values	
Mission	
Vision	

Meet the team

Name	Role	Ask me about

Humble, Hungry & Smart

In *The Ideal Team Player*, Patrick Lencioni describes the ideal team player as humble, hungry, and smart. Humble means putting the team first and owning your mistakes. Hungry means self-motivated, always looking for what needs doing next. Smart means people-smart: reading the room and knowing how your words land with patients and teammates. Write what each one looks like in your practice.

Humble

Example: Says "I missed that, can you show me again?" instead of making an excuse.

What does it look like here?

Hungry

Example: Uses a slow moment to restock, tidy up, or ask what else needs doing, without being asked.

What does it look like here?

Smart

Example: Notices a nervous patient in the waiting area and gives the team a heads-up before they're called back.

What does it look like here?

What the ideal team player means to us

Describe it in your own words so new team members know what to aim for.

What we look for in your first 12 weeks

Signs you're on track	Things that don't work here
Eager to learn and willing to jump in	Being late, again and again
Asks questions when something isn't clear	Needing the same instruction over and over
Takes feedback well and uses it right away	Making the same mistakes with no effort to fix them
Owns mistakes and asks how to avoid them next time	Hiding mistakes instead of talking about them
Stays busy and finishes tasks without being asked	Gossip or stirring things up behind the scenes
Helps teammates wherever they're needed	Standing around when there's work to do

Words we use here

New team members don't speak your office's language yet, so it's easy to misread what's being asked. Add the terms and shorthand your team uses every day.

Term	What it means
Op	Short for operatory, a treatment room
Hygiene check	The doctor's exam at the end of a hygiene visit
Recall	A patient's next routine cleaning and exam visit

FOA TIP

Mistake to avoid: Waiting on a bad fit

If something feels off in the first few weeks, don't wait and hope it fixes itself. Write down what you're seeing and bring it up early, using the check-ins in Part 4.

Part 4: The 12-Week Plan

FOR THE NEW TEAM MEMBER AND TRAINER

WEEKS 1–2 Orientation & Shadowing

How each training session works

1. Watch the how-to video, if there is one.
2. Read the written guide or tips document.
3. Do the task with your trainer, using a real example.
4. Do the task while your trainer watches, then do it on your own once they sign off.

If it's not clicking, change how you teach it. Show them, then watch them, reword it, or try a different format.

Training sessions

	Topic or recurring task	Prep (watch or read)	Trainer	When
☐	Office tour and safety basics: exits, emergency kit, where supplies live, and what to do after a needlestick or exposure	Office emergency and exposure plan		
☐	How the day runs: huddle, patient flow, and the end-of-day routine	Sit in on one huddle first		
☐	Practice software basics: the schedule, finding a patient, and adding a note	Software how-to video, if any		
☐	Patient privacy in daily work: what you can say, where, and to whom	Privacy section of the employee manual		
☐	Shadow each area for part of a day: front desk, assisting, and hygiene	None		
☐	Attend huddle and team meetings, and listen to how they run	None		
☐	Start position training (see your role's training plan)	Your role's training plan		

FOA TIP

Mistake to avoid: Keeping them on the sidelines when it's busy

A hectic day can teach a new hire more than a quiet one. Pair them with a trainer, give them simple tasks to jump into, and encourage them to stay curious, ask why things are done a certain way, and step in when they see something that needs doing. Save the solo work for later, once they've seen how your office handles things.

Daily check-ins

For the first two weeks, the trainer checks in with the new team member every day. Ask:

- How are you doing?
- What's working?
- What's not?
- Where can I support you?

Also in the first two weeks

- Learn the office's daily routine and systems, and which tasks are automated, such as appointment reminders.
- Learn how the practice talks to patients, in person and on the phone.
- Join the huddle and team meeting to see how each day is planned.
- Begin any ongoing training or certification your role requires.

WEEKS 3–4 Guided Practice

	Task	Supervisor	Approved?
☐	Bring one small work goal to the team meeting		
☐	Follow the office's communication rules for a full week: team chat, handoffs, and who to ask		
☐	Follow one patient from check-in to checkout, then explain each step back to your trainer		
☐	Walk through the emergency plan and your role in it		
☐	Answer a common patient question using the office's approved wording while your trainer listens		
☐	Continue position training (see your role's training plan)		

FOA TIP

Mistake to avoid: Giving them solo work too soon

Handing a new hire tasks to run on their own before they're ready can make a good hire quit before they've had a fair chance. Add solo tasks a little at a time, and keep them paired with your strongest people until they've shown they can handle it.

WEEKS 5–8 Doing It Yourself

	Task	Checked by	Done on
☐	Run your daily routine on your own, from start of day to close		
☐	Hold a 15-minute weekly check-in with your trainer to plan the week ahead		
☐	Handle a patient concern the office's way, then talk it through with your trainer		
☐	Help another area when the schedule gets busy, and hand off clearly when you're done		
☐	Finish any required training still open		
☐	Come prepared to huddle and team meetings with your updates		
☐	Continue position training (see your role's training plan)		

WEEKS 9–12 Owning It

	Goal	Metric or result	Done on
☐	Fully own your daily routine without supervision	Runs 5 full days in a row with no trainer corrections	
☐	Take on one new task your manager assigns, and run it on your own	New task done solo by Week 11, checked by manager	
☐	Know the numbers your role affects, like schedule fill at the front desk or on-time starts in the back	Names 2 to 3 numbers and reviews them with manager by Week 12	
☐	Suggest one improvement to a process you use every day	Brings 1 idea to their manager by Week 12	
☐	Show a teammate how to do one task you've mastered	Walks a teammate through 1 task by Week 12	
☐	Lead your part of morning huddle	Leads their part for 1 full week	
☐	Continue position training (see your role's training plan)	All Week 12 items in the position plan signed off	

Phase check-ins

At the end of each phase, sit down with your new team member, talk through these questions, and write down what you hear.

Phase	Questions to ask	Notes and date
Weeks 1–2	1. Which logins or systems are still giving you trouble? 2. Who on the team haven't you worked with yet? 3. How does the job feel so far, compared to what you expected?	
Weeks 3–4	1. Which task feels natural now, and which still feels shaky? 2. Is the feedback you're getting clear and useful? 3. What part of the day feels most stressful right now?	
Weeks 5–8	1. What can you handle on your own now that you couldn't a month ago? 2. When you get stuck, do you know who to go to? 3. Do you feel supported, or on your own too much?	
Weeks 9–12	1. Which tasks do you fully own, and which still need a second look? 2. What would you change about how we onboard the next person? 3. Do you feel like part of the team here?	

At Week 2 and Week 12, the new team member also gives feedback on their trainers. Ask what helped, what didn't, and what they'd change.

> **If a benchmark is missed**
>
> 1. Ask what they need.
> 2. Check that the expectation was clear.
> 3. Give extra support, like more shadowing or a different way of teaching it.
> 4. Set a two-week timeline to improve, write it down, and check in at the end.

> **FOA TIP**
>
> **Mistake to avoid: Letting small things slide**
>
> It's easy to brush off small issues because someone is "still new," but those habits keep growing and get harder to fix the longer they go. Correct things in the moment, kindly and clearly, so the standard stays the same for everyone.

Part 5: Ongoing Responsibilities

REVIEW TOGETHER

Once the 12 weeks are done, this is what every team member owns, whatever their role. Experienced hires go through new hire onboarding too, because every office has its own standards.

ROLE	REPORTS TO	YOUR POSITION RESPONSIBILITIES

Daily and weekly team expectations

- Arrive on time and ready for morning huddle
- Know the day's schedule and your part in it
- Keep shared spaces clean and stocked
- Leave clear notes and handoffs for the next person

Compliance and renewals

- Complete required training, such as HIPAA and OSHA, when it's due
- Keep your license or certification current, if your role has one
- Protect patient privacy in every conversation and system
- Report safety or privacy concerns to your manager right away

Collaboration and communication

- Attend huddles and team meetings, and speak up
- Follow the office's communication rules for chat, phone, and handoffs
- Help other roles when the schedule gets busy
- Bring problems to the right person, not the break room

Professional development

- Meet with your manager monthly to review goals
- Take part in ongoing team training
- Keep working through your position training plan
- Complete any course or certification your role requires

Sign-off

We reviewed this plan together, and the team member is ready to own the responsibilities above.

Role	Name	Signature	Date
New team member			
Manager			

Onboarding doesn't stop at Week 12. Keep monthly check-ins going so small problems don't build up.

Notes and next steps

Pair this plan with position training

Position training runs alongside this plan from the first week. Your new team member learns how your office runs here, while their department lead teaches the skills of the role.

> **About Front Office Academy**
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> Front Office Academy is online training for the whole dental team, created by Dr. Mark Costes, Dr. Addison Killeen, Sydney Robinson, and other dental industry leaders. It includes role-specific training for front desk, scheduling, treatment coordination, insurance and billing, office management, dental assisting, and hygiene, so every new hire has a position training plan from day one.

Ready for the next step? Try Front Office Academy free for 7 days and see the training for every role on your team.

Start your free 7-day trial