

**NEW FRONT OFFICE EMPLOYEE / RECEPTIONIST CHECKLIST**

**EMPLOYEE NAME:** \_\_\_\_\_ **DATE STARTED:** \_\_\_\_\_

Welcome to your new role in this great dental office. We are glad you joined the team. In order to train you on many aspects of the front office, we utilize a Front Office Training Website to show you videos that will train you on much of what you will need to know when it comes to a lot of what happens in a dental office on a daily basis. These videos employ ideas and concepts of things that would likely be done within our dental office; however, do not override our offices policies and procedures. You will hear many times in the videos, to ask your office manager or dentist about how they would want you to handle something. These training videos are used to help you with overall concepts and skills. If you have specific questions about how things should be handled or things that might contradict with what you were told by one of our employees, please bring it to the attention of the Office Manager or dentist so they can let you know what exactly they would like done.

Below is a checklist to help guide your training through the site and the videos. Your dentist or Office Manager will tell you the exact way they want you to utilize this checklist in your training. However, here are a few guidelines:

*Initials and date of trainer or new employee to acknowledge the task has been completed:*

*(When taking quizzes, you must get 80% or higher to pass. If your score is less than 80% re-watch the video to see what you missed and take quiz again. If necessary go to office manager or trainer to discuss if not getting 80%. For Essays, turn into office manager or trainer and look for them to give back to you if everything is good. If there are more discussions needed regarding the topic, the OM or trainer will sit down to discuss further.)*

New Hire Initials: \_\_\_\_\_

- \_\_\_\_\_ Read and initial the above paragraph to acknowledge you understand
- \_\_\_\_\_ Meet with manager to discuss Front Office Rocks, what it is and how you should utilize this checklist
- \_\_\_\_\_ Read Home Page – initial when completed
- \_\_\_\_\_ Read About Us Page – initial when completed
- \_\_\_\_\_ Read Front Office Training Page & watch video on top of page – initial when completed
- \_\_\_\_\_ In your own words, write what each position does within a dental office – turn into Office Manager
- \_\_\_\_\_ Watch and take quiz for Telephone Training – Making The Phone a Priority – turn in if over 80%

- \_\_\_\_\_ Have another employee show you how to answer phone, put on hold, transfer, etc.
- \_\_\_\_\_ In your own words, write why it's important to make the phones a priority and how you will do it – turn in
- \_\_\_\_\_ Watch New Patient Customer Service and take quiz – turn in if over 80%
- \_\_\_\_\_ Watch New Patient Phone Call & take quiz – turn in if over 80%
- \_\_\_\_\_ Meet with your Office Manager to discuss your role answering the phones and any specifics to your office
- \_\_\_\_\_ Watch Have New Patients Schedule Within 24-72 Hours & take Quiz – turn in if over 80%
- \_\_\_\_\_ In your own words, write the importance of caring for the new patient to the benefit of the office.
- \_\_\_\_\_ Watch Insurance Questions and take quiz – turn in if over 80%
- \_\_\_\_\_ In your own words, write why it's important to know how to handle insurance pricing
- \_\_\_\_\_ Meet with your Office Manager or Trainer to discuss how best you can handle new patients and insurance
- \_\_\_\_\_ Find out if your office participates with insurance and if your office has any new patient specials
- \_\_\_\_\_ Watch Second Opinion & Shoppers take quiz – turn in if over 80%
- \_\_\_\_\_ Watch How To Handle Cancellation and take quiz –turn in if over 80%
- \_\_\_\_\_ Find out what the office cancellation policy is
- \_\_\_\_\_ Watch Handling Late Patients and take quiz - turn in if over 80%
- \_\_\_\_\_ In Your Own Words, write why it is important that you know how to handle cancelations and late patients
- \_\_\_\_\_ Watch Walk in Sales People and take quiz – turn in if over 80%
- \_\_\_\_\_ Meet with Office Manager to find out how they want you to handle walk in interruptions
- \_\_\_\_\_ Meet with your Office Manager to find out how they want you to handle patients calling to leave the practice
- \_\_\_\_\_ Watch Patients Asking For X-rays and take quiz – turn in if over 80%
- \_\_\_\_\_ Watch Lunches and Phone Coverage and take quiz – turn in if over 80%
- \_\_\_\_\_ Find out how your office handles lunchtime phone coverage and the phones after hours
- \_\_\_\_\_ Watch The Right Amount Of Communication and take quiz – turn in if over 80%
- \_\_\_\_\_ In your own words, write how you will utilize this information and implement throughout your workday