**Compensation Tools and Worksheets**

A notebook with a calculator and school supplies

Description automatically generated

* Your Compensation Philosophy worksheet
* Awarding Points worksheet
* Where to find comparable salaries in your community
* Open-ended Questions
* Dentist’s Assessment worksheet
* Team Member’s Self-Assessment worksheet
* Contract for Performance worksheet
* Employee Compensation Package worksheet
* Job descriptions
  + Appointment Coordinator
  + Financial /Insurance Coordinator
  + Hygiene Coordinator
  + Office Manager
  + Dental Assistant
  + Hygienist
  + Hygiene / Sterilization Assistant

**Your Compensation Philosophy Worksheet**

My employees deserve compensation that is:

a.

b.

c.

d.

e.

I want to reward, appreciate and acknowledge employees who:

I want to incorporate the following benefits in my practice because they reflect my values:

I define “competitive” compensation as:

**Awarding Points Worksheet**

* + - 1. Your chosen *potential* percentage increase:

%

* + - 1. Translated into points: \_\_\_\_\_\_\_\_\_\_\_
      2. Divide the points among the 3 competencies:

Job Role:

Teamwork:

Practice Building:

**Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Current Gross Annual Salary**: \_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |
| --- | --- | --- | --- |
| **Category** | **Available Points** | **Employee Actions** | **Awarded Points** |
| **Job Role** | 0- |  |  |
| **Teamwork** | 0- |  |  |
| **Practice building** | 0- |  |  |

**Awarded Points** = \_\_\_\_\_% increase **New Annual Salary**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Where to Research Comparable Salaries**

Online Resources

Free, national websites where you plug in your job title and town (or zip code) and view salary ranges in your area. You can also peruse the job ads posted by your colleagues to see what they’re offering.

* **Salary.com:** On the home page, plug in your job title and community under the “individuals find what your worth” question
* **Glassdoor.com**: Google “Glassdoor salaries’ and it will take you directly to their salary page
* **Salaries Indeed.com:** Google “salaries Indeed” to go directly to the right page

Personal Connections

To make sure that you compare your practice to a similar one, ask your personal network about benefits, work hours, practice size and specialties.

* Study club colleagues
* Accountant /bookkeeper/financial advisor
* Your dental supply representative
* Payroll service

**Open-Ended Questions for the Performance Meeting**

* Tell me why you gave yourself these ratings.
* What specific examples illustrate your ratings?
* What did you do this past year that you see as an achievement?
* What were you most proud of accomplishing?
* How did that accomplishment help the practice?
* What do you do in our practice that truly engages and satisfies you?
* What task or responsibility poses the most difficulty for you?
* If given the chance, what would you do differently?
* What distractions or issues got in the way of doing your best work?
* What do you need to make it easier?
* What do you think I will say about your contribution over the last year?
* What will I say are your strengths and challenges?
* How do you think you’re perceived by your peers?
* What can I do differently in the way I support you or give feedback?
* What are your personal goals for growth?

**Dentist’s Form**

**TEAM MEMBER ASSESSMENT**

Name: Date:

What are the team member’s most important responsibilities?

1.

2.

3.

4.

5.

**Job Role:** How well does the employee perform these responsibilities?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Outstanding performance | Usually exceeds expectations | Consistently strong performance | Partially meets expectations | Inconsistent performance |
| Demonstrates energy into fulfilling their responsibilities. |  |  |  |  |  |
| Demonstrates enthusiasm for their work. |  |  |  |  |  |
| Seeks ways to improve his/her skills. |  |  |  |  |  |
| Strives to ensure s/he is accurate and thorough. |  |  |  |  |  |
| Stays on track and uses time effectively. |  |  |  |  |  |
| Treats patients with courtesy and kindness. |  |  |  |  |  |

**Teamwork:** Describe the employee’s interactions with the team.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Outstanding performance | Usually exceeds expectations | Consistently strong performance | Partially meets expectations | Inconsistent performance |
| Volunteers to help even when it’s not his/her “job” |  |  |  |  |  |
| Seeks ways to train teammates |  |  |  |  |  |
| Shares information and ideas. |  |  |  |  |  |
| Respectful and friendly with teammates. |  |  |  |  |  |
| Seeks and accepts feedback. |  |  |  |  |  |
| Punctual and available to work. |  |  |  |  |  |

**Practice Building:** How does the employee help the practice thrive as a business?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Outstanding performance | Usually exceeds expectations | Consistently strong performance | Partially meets expectations | Inconsistent performance |
| Actively participates at huddles and team meetings. |  |  |  |  |  |
| Reduces financial impact of unfilled appointments. |  |  |  |  |  |
| Suggests ways to increase production & collections. |  |  |  |  |  |
| Communicates with patients so that they value their dental treatment. |  |  |  |  |  |
| Represents the practice’s philosophy and values in everything they do. |  |  |  |  |  |
| Promotes the practice by asking for referrals and speaking positively. |  |  |  |  |  |

**Self-Reflection and Goals:**

What do you see as the employee’s accomplishments this past year?

What would you like to see the employee do more of or less of in the next 12 months so that the practice successfully reaches its financial goals, attracts and retains patients and is a good place to work?

What knowledge, skills or abilities (KSAs) does the employee need to develop? Examples: clinical technique, scheduling, collecting, patient communication, time management, decision-making, teamwork, planning, and organizing.

1.

2.

3.

4.

Your commitments to support this employee’s growth:

**TEAM MEMBER SELF-ASSESSMENT**

Name: Date:

What do you see as your most important responsibilities?

1.

2.

3.

4.

5.

**Job Role:** How well do you perform these responsibilities?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Outstanding performance | Usually exceeds expectations | Consistently strong performance | Partially meets expectations | Inconsistent performance |
| I demonstrate energy in fulfilling my responsibilities. |  |  |  |  |  |
| I express enthusiasm for my work. |  |  |  |  |  |
| I seek ways to improve my skills. |  |  |  |  |  |
| I strive to ensure I am accurate and thorough. |  |  |  |  |  |
| I stay on track and uses time effectively. |  |  |  |  |  |
| I treat patients with courtesy and kindness. |  |  |  |  |  |

**Teamwork:** Describe your interactions with the team.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Outstanding performance | Usually exceeds expectations | Consistently strong performance | Partially meets expectations | Inconsistent performance |
| I volunteer to help even when it’s not my “job” |  |  |  |  |  |
| I seek ways to train teammates |  |  |  |  |  |
| I share information and ideas. |  |  |  |  |  |
| I’m respectful and friendly with teammates. |  |  |  |  |  |
| I seek and accept feedback. |  |  |  |  |  |
| I’m punctual and available to work. |  |  |  |  |  |

**Practice Building:** How do you help the practice thrive as a business?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Outstanding performance | Usually exceeds expectations | Consistently strong performance | Partially meets expectations | Inconsistent performance |
| I actively participate at huddles and team meetings. |  |  |  |  |  |
| I actively encourage patients to keep their appointments. |  |  |  |  |  |
| I suggest ways to increase production & collections. |  |  |  |  |  |
| I communicate with patients so that they value their dental treatment. |  |  |  |  |  |
| I represent the practice’s philosophy and values in everything I do. |  |  |  |  |  |
| I promote the practice by asking for referrals and speaking positively. |  |  |  |  |  |

**Self-Reflection and Goals:**

What do you see as your accomplishments this past year?

What would you like to do more of or less of in the next 12 months so that the practice successfully reaches its financial goals, attracts and retains patients and is a good place to work?

What knowledge, skills or abilities (KSAs) do you need to develop? Examples: clinical skills, scheduling, collecting, patient communication, time management, decision-making, teamwork, planning, and organizing.

1.

2.

3.

4.

What would you like the dentist to do to support your growth?

**Team Member Contract for Growth**

Name: Date:

**Employee’s Attitudes and Qualities:** The personal characteristics or attitudes you will develop (or continue demonstrating) this year:

**Employee’s New Actions:** Describe using measurable criteria and due dates.

**Job Role Success Standards When**

1.

2.

**Teamwork Success Standards When**

1.

2.

**Practice Building Success Standards When**

1.

2.

**Training or CE** the employee will engage in:

**Dentist’s actions** to support your performance. (When possible, use measurable targets and identify due dates)

**Employee Compensation Package**

Employee Name: Date:

|  |  |
| --- | --- |
| **Current Compensation Package** | **New Compensation Package** |
| Cash compensation  Per hour: \_\_\_\_\_\_\_  Per year: \_\_\_\_\_\_\_  Bonus: \_\_\_\_\_\_\_  Employer paid taxes \_\_\_\_\_\_\_  Paid time off  # Sick Days: \_\_\_\_\_\_\_  #Vacation Days: \_\_\_\_\_\_\_  # Holidays: \_\_\_\_\_\_\_  # Other: \_\_\_\_\_\_\_  Value of time off benefits: \_\_\_\_\_\_\_  Team Benefits  Pension/401k: \_\_\_\_\_\_\_  Health: \_\_\_\_\_\_\_  Uniform: \_\_\_\_\_\_\_  Dental care: \_\_\_\_\_\_\_  Cont. Ed: \_\_\_\_\_\_\_  Rewards: \_\_\_\_\_\_\_  Other: \_\_\_\_\_\_\_  Value of Total Benefits \_\_\_\_\_\_\_  **Total Compensation**  **Package** | Cash compensation  Per hour: \_\_\_\_\_\_\_  Per year: \_\_\_\_\_\_\_  Bonus: \_\_\_\_\_\_\_  Employer paid taxes \_\_\_\_\_\_\_  Paid time off  # Sick Days: \_\_\_\_\_\_\_  #Vacation Days: \_\_\_\_\_\_\_  # Holidays: \_\_\_\_\_\_\_  # Other: \_\_\_\_\_\_\_  Value of time off benefits: \_\_\_\_\_\_\_  Team Benefits  Pension/401k: \_\_\_\_\_\_\_\_  Health: \_\_\_\_\_\_\_\_  Uniform: \_\_\_\_\_\_\_\_  Dental care: \_\_\_\_\_\_\_\_  Cont. Ed: \_\_\_\_\_\_\_\_  Rewards: \_\_\_\_\_\_\_\_  Other: \_\_\_\_\_\_\_\_  Value of Total Benefits \_\_\_\_\_\_\_\_  **Total Compensation**  **Package** |

**Appointment Coordinator Job Description**

**VISION OF THIS POSITION**

The Appointment Coordinator is the face and voice of our office. Because you are often the first-person patients meet, you demonstrate the practice’s philosophy and quality through every interaction. Your overall goal is to create a balanced, productive schedule, so that patients receive appointment times that match their preferences and the practice’s goals.

Your primary responsibility is to fill the doctor’s and hygiene schedules to meet the practice’s production, efficiency and collection goals. To accomplish this, you coordinate patient services from the 1st phone call through on-going hygiene care.

You take the initiative to reconnect with patients to fill openings and confirm patients’ commitment to their appointment time. You promote the practice by asking for referrals / reviews. You are cross-trained and can assist the other front desk employees when required and create consistency and stability at the front desk.

**KNOWLEDGE, SKILLS AND ABILITIES**

* Exemplary communication and customer service skills. Communicates professionally and compassionately with patients.
* Demonstrates diligence and attention to detail.
* Demonstrates proficiency with our practice management software and scheduling mechanics. Can schedule appointments accurately based on our ideal day templates and fills the pre-blocks consistently.
* Self-directed, creative, problem-solving skills.
* Open and enthusiastic about learning new skills and is responsive to feedback and coaching.

**MEASURES OF SUCCESS**

* Schedulesassigned clinicians to reach their production goal XX% of the time.
* XX of new patient inquiries convert to scheduled appointments.
* XX% of patients leave with their next appointment scheduled.
* Fills openings so that every clinician has under 5% unfilled.
* Responds to patient text/email or phone queries within X hours.
* Fills XX% of pre-blocked appointments with the appropriate treatment.
* Explains the patient’s financial responsibilities, answers their questions and concerns so that we achieve an XX% case acceptance rate for new patients and XX% for patients of record.

**KEY RESPONSIBILITIES**

**JOB ROLE**

Scheduling Responsibilities

* Communicates professionally and compassionately with patients while delivering “bad news.”
* Consistently monitors and adjusts the schedule so that the practice meets its goals.
* Schedules patients based on our ideal day templates and production goals.
* Tracks case acceptance and informs the dentist about patients who decline to appoint.
* Follows up with patients who have been referred so they re-appoint.
* Reviews patient records, noting any outstanding treatment needs.
* Run reports to fill openings with patients on the quick call or unscheduled treatment list.
* Records treatment information in the patient’s chart.
* Follows up on patient referrals so that we can thank referring patients.

Patient Communication Responsibilities

* Answers the phone within X rings and represents the practice’s values and philosophy in each call.
* Greets patients by name and updates their information.
* Registers new patients and sends them the welcome letter & forms the same day they call.
* Informs patients if the clinician is behind schedule and offers additional hospitality.
* Implements an effective reactivation system for unscheduled or overdue treatment so that XX% of that list is contacted by the end of every week.
* Keeps patients accountable to our no-show and late cancellation guidelines. Notes chronic last-minute cancellations in the patient’s file. Calls patients if they are five minutes late to determine their status and inform the clinical team.
* Effectively utilizes the practice’s confirmation process. Ensure patients have “confirmed” two business days in advance of an appointment.
* Keeps patients accountable to our no-show and late cancellation guidelines. This may include verbal warnings, fees, letters and dismissal from the practice. Notes chronic last-minute cancellations in the patient’s file. Calls any patient that is five minutes late to determine their status and informs the clinical team.
* Ensures patients understand their financial responsibilities prior to their appointments to minimize surprises.

**TEAMWORK**

* Prepares for and actively participates in the morning huddle: updates staff about changes, next openings and production and collection metrics. Suggests solutions to scheduling issues.
* Alerts appropriate staff of patient arrivals or cancellations.
* Coordinates and communicates with front desk colleagues to ensure there is seamless customer service.
* Cross-trains with other front desk members to provide mutual assistance.
* Acts on the information relayed during handoffs so that the patient experiences smooth customer service.

**PRACTICE BUILDING**

* Prepares for and engages in all team meetings by brainstorming, problem-solving, training and sharing information effectively and collaboratively. Offers thoughts and insights so that we can grow.
* Initiates and accepts projects that improve the practice’s systems, productivity and profitability.
* Expands skills & knowledge through CE activities and introducing new methods and ideas to the team.
* Participates in all promotional activities such as asking for referrals, writing social media posts, collecting patient testimonials and sharing business cards.

**Leadership and Self-Direction**

Our practice is dedicated to continuous learning and mutual support. We value employees who use their initiative to improve the practice and support our growth.

We expect every employee will generously collaborate with their colleagues so that as a team we provide exemplary care to our patients.

**Financial / Insurance Coordinator Job Description**

**VISION OF THIS POSITION**

The financial /insurance coordinator is the backbone of the front desk team, ensuring that patients get the care they need by understanding their treatment plan and committing to their financial obligations. The financial /insurance coordinator has calm, compassionate conversations with patients who may be anxious about their fees.

You work closely with patients, the clinicians, insurance administrators and front desk colleagues so that patients have accurate quotes about their fees and there is a seamless transition from the back office to a payment plan.

**KNOWLEDGE, SKILLS, AND ABILITIES**

* Relationship building, negotiation and creative problem-solving skills.
* Expertise with ADA codes, the verification process and insurance restrictions.
* Exemplary and consistent attention to detail.
* Mastery of our practice management software and insurance company’s online tools.
* Familiarity with dental insurance protocols.
* Superb verbal skills with patients, insurance companies and staff.
* Overall understanding of office philosophy and systems.
* Understands dental terminology so can accurately communicate with patients.
* Excellent math skills.
* Conscientious and able to work independently

**MEASURES OF SUCCESS**

* Achieves daily collection goal of XXXX
* Maintains or achieves collection percentage of XX%
* Maintain healthy accounts receivable of 1 to 1½ months outstanding
* Verifies new patient’s insurance X days before their appointment
* Files claims within XX hours/days of patient appointment
* Responds to insurance companies within XX days
* Contact patients who are overdue with their financial agreement within X days.

**KEY RESPONSIBILITIES**

**JOB ROLE**

* Determines insurance eligibility, limitations and payment estimates.
* Researches insurance benefits and prepares estimates to give to patients while they are in the office.
* Identifies the nuances of the insurance plans that are used most frequently so that we give our patients accurate information.
* Processes and submits insurance claims daily.
* Monitors and follows up on outstanding claims.
* Corresponds with insurance companies to resolve payment delays, requests for additional information, or to discuss treatment that has been denied coverage.
* Provides insurance predetermination documentation to patients when asked, contacts the patient to make financial arrangements, and schedules treatment.
* Prepares for huddle by reviewing and identifying patients who have an outstanding balance
* May present or co-present with dentist during consultations. Respond to objections so that patients feel comfortable and motivated to schedule
* Prepares financial information for dentist to use in consultations
* Ensures that patients are informed about fees before additional treatment is performed.
* Obtains a signed financial agreement that identifies number of payments and due dates
* Prepares and deliver a daily financial statement to the Dr/office manager
* Sends overdue accounts to appropriate final step collections
* Fully utilizes on-line opportunities that provide information regarding
* Contacts patients who have not kept their financial agreement within X days.

**TEAMWORK**

* Proactively communicates with the back office so they know any changes in the patient’s financial status
* Shares information about finances in huddles
* Leads and participates in staff meetings with skills including facilitation, training and problem solving
* Fully utilizes admin time to meet with colleagues and prepare for next day
* Takes initiative when practice is running behind or understaffed
* Embodies the practice philosophy in all actions and decisions

**PRACTICE BUILDING**

* Provides the appointment coordinator with patient names and amounts due, to ensure effective collection over-the-counter payments.
* Identifies patients in the daily schedule with overdue balances and speaks with them either before or at the time of the appointment.
* Writes or calls patients that made a special impact on the office thanking them for being our patient
* Improves or maintains high case acceptance though conversations with patients.
* Prepares for and engages in all team meetings by brainstorming, problem-solving, training and sharing information effectively and collaboratively. Offers thoughts and insights so that we can grow. Initiates and accepts projects that improve the practice’s systems, productivity and profitability.
* Expands his/her skills & knowledge through CE activities and introducing new methods and ideas to the team.
* Participates in all promotional activities such as asking for referrals, writing social media posts, collecting patient testimonials and sharing business cards.

**Leadership and Self-Direction**

Our practice is dedicated to continuous learning and mutual support. We value employees who use their initiative to improve the practice and support our growth.

We expect every employee will generously collaborate with their colleagues so that as a team we provide exemplary care to our patients.

**Hygiene Scheduling Coordinator Job Description**

**VISION OF THIS POSITION**

The Hygiene Scheduling Coordinator is the face and voice of our hygiene department. You build patients’ value for hygiene care. You coordinate and implement all patient services related to continuing care compliance and act as the liaison between our hygiene team and patients. Your overall goal is to fill the hygiene schedule effectively so that we can meet our daily production and collection goals.

**KNOWLEDGE, SKILLS, AND ABILITIES**

* Exemplary communication and customer service skills. Communicates professionally and compassionately with patients while delivering “bad news.”
* Balances filling the practice’s schedule against patients’ scheduling preferences.
* Strong attention to detail.
* Mastery of practice management software and scheduling mechanics from ideal day templates to timing and pre-blocks.
* Self-directed, creative problem-solving skills.
* Proactive communication and problem-solving skills to manage changes.
* Enthusiasm for learning and responsive to feedback and coaching.

**MEASURES OF SUCCESS**

* Schedule each hygienist to reach their production goals XX% of the time
* Ensure that XX% of the active patient base is committed to their continuing care intervals
* Ensure that xx% of hygiene patients leave with their next appointment scheduled.
* Achieve 5% no show and cancellation rate in hygiene
* Respond to calls, emails and messages within X hrs. or business days.

**KEY RESPONSIBILITIES**

**JOB ROLE**

* Monitors and adjust the hygiene schedule so the practice meets its goals.
* Schedules patients using ideal day templates and production goals.
* Tracks case acceptance and informs clinician if patients decline to appoint.
* Follows up and reschedules patients who have been referred to specialists.
* Reviews patient records, noting any outstanding treatment needs.
* Fills openings with patients on the quick call or unscheduled treatment list.
* Records treatment information in the patient’s chart and/or computer as directed.
* Monitors patient referrals so that we can thank referring patients.
* Greets patients by name and updates their information.
* Registers new patients
* Informs patients if the clinician is behind schedule and offer additional hospitality.
* Implements a reactivation system.
* Keeps patients accountable to our no-show and late cancellation guidelines. This may include verbal warnings, fees, letters and dismissal from the practice. Notes chronic last-minute cancellations in the patient’s file. Calls any patient that is five minutes late to determine their status and informs the clinical team.
* Ensures patients have “confirmed” two business days in advance of an appointment.
* Ensures patients understand their financial responsibilities prior to their appointments to minimize surprises.

**TEAMWORK**

* Tweaks or develops systems with input from colleagues and dentist.
* Cross trains other team members so that they can schedule hygiene patients.
* Provides back-up support to answer phone within 3 rings.
* Responds to customer service issues.
* Prepares and participates in the huddle: updates staff about changes, next openings and production and collection metrics. Assists in problem-solving any scheduling issues.
* Responds to information relayed during handoffs so that the patient experiences seamless customer service.

**PRACTICE BUILDING**

* Prepares for and engages in all team meetings by brainstorming, problem-solving, training and sharing information effectively and collaboratively. Offers thoughts and insights.
* Initiates and accepts projects that will improve the practice’s systems, productivity and profitability.
* Actively participates in internal, community and virtual marketing by asking patients for referrals/reviews.
* Actively participates in all continuing educational opportunities to expand your skill set.
* Writes or calls patients that made a special impact on the office thanking them for being our patient.

**Leadership and Self-Direction**

Our practice is dedicated to continuous learning and mutual support. We value employees who use their initiative to improve the practice and support our growth.

We expect every employee will generously collaborate with their colleagues so that as a team we provide exemplary care to our patients.

**Office Manager Job Description**

**VISION OF THIS POSITION**

The Office Manager is the caretaker and guardian of the front office systems and the practice as a whole. You have an integral role in keeping the team and office running smoothly. You embody the dentist’s philosophy and create a warm, caring environment for everyone associated with the practice.

You ensure that the practice’s operating systems run smoothly and that the team are well-trained and can perform their responsibilities.

**KNOWLEDGE, SKILLS AND ABILITIES**

* Superb verbal and relationship building skills
* Delegation, Influencing and negotiation skills
* Resourcefulness and adaptability
* Ability to function within a team and work independently
* Computer skills including practice management software
* Familiarity with dental insurance protocols
* Familiarity with ADA codes
* Teamwork and leadership skills
* Familiarity with HR/Staff Management skills including hiring, firing, coaching, counseling.
* Enthusiasm for promoting the practice to new patients
* Creative problem-solving skills
* Excellent math skills and attention to detail
* Keen understanding of the practice’s scheduling and financial systems

**MEASURES OF SUCCESS**

* Achieve daily production goal of XXXX and maintain XX% collection
* Maintains healthy accounts receivable of 1 to ½ months outstanding
* Schedules XXX new patients per year, with XX% of new patient inquiries converted to new patient appointments
* Maintains unfilled hours to stay below 5%
* Achieves XX% case acceptance for new patients and XX% for patients of record.

**KEY RESPONSIBILITIES**

**JOB ROLE**

**Front Office**

* Monitors front office systems daily, tweaks or develops new systems as needed with input from the front office team and the dentist.
* Cross trains the team so that they can schedule, make financial arrangements or process insurance when appropriate
* Supervises and monitor payment plans, credit and cash payments, F/A documentation, and insurance submissions
* Continually monitors A/R and implements a process for quick reimbursement from insurance companies or patients.
* Ensures that statements are sent on schedule, delinquent accounts are addressed, and the internal financial guidelines are followed.
* Works closely with patients, the clinical team and the doctor to facilitate a seamless transition from treatment conversations to commitment to a financial plan.
* Updates the dentist about problems or successes from the previous day.
* Ensures that phones are answered appropriately, and calls are returned in a timely manner.
* Supervises the schedule to ensure that goals are being met based on our ideal day templates, with the appropriate number of pre-blocks reserved.
* Supervises the gathering of reports for huddle, admin time, and team meetings.
* Works with vendors to ensure that our technology works efficiently, and maintenance is completed in a timely fashion.
* Ensures that end of day production reports are completed and signed off and monitors the practice’s metrics to ensure the practice is healthy, profitable and productive.
* Oversees charting protocols to insure they are up to date and HIPAA compliant.
* Prepares deposits and reconciles collections daily.
* Enforces the budget for office supplies and other front office materials.

**Team Management**

* Maintains and updates the Employee Policy Manual, job descriptions, personnel files.
* Oversees staff schedules to align with our PTO, vacations, holidays guidelines.
* Works with Dr to resolve conflicts that affect daily operations.
* Coordinates performance and salary review conversations and may co-lead these with the dentist.
* Ensures employees are punctual and work within our overtime policies.
* Represents the Dr and the vision of the practice.
* Creates a safe environment for employee growth by providing effective feedback, counseling and training.

**TEAMWORK**

* Helps create a practice culture that feels safe and supportive with a focus on continuous improvement.
* Models excellent verbal skills with patients and staff.
* Communicates with staff when protocol was not followed and provides effective, respectful direction and feedback.
* Informs team of next available pre-blocks and emergency time.
* Embodies the practice philosophy in all actions and decisions.

**PRACTICE BUILDING**

* Engages in all team meetings by brainstorming, problem-solving, training and sharing information effectively and collaboratively. Offers thoughts and insights. Prepares for team meetings, offers insight into statistics, initiates improvements and implements suggestions. to support the practice goals.
* Initiates and accepts projects that will improve the practice’s systems, productivity and profitability.
* Actively participates in internal, community and virtual marketing by asking patients for referrals/reviews.
* Works with vendors to ensure expenses stay within our budget.
* Actively participates /oversees marketing strategies that reinforces our brand. Promotes our practice by speaking positively about our team to patients and vendors.
* Asks patients for referral/online testimonials and hands out business cards. Writes or calls patients that made a special impact on the office.
* Actively participates in continuing educational opportunities to expand your skills set. Seeks CE opportunities for other staff to improve their skills and the functioning of the office.
* Develops a Standard Operating Procedure Manuel to describe our processes and protocols.
* Oversees the upkeep of the facility and equipment of the practice.

**Leadership and Self-Direction**

Our practice is dedicated to continuous learning and mutual support. We value employees who use their initiative to improve the practice and support our growth.

We expect every employee will generously collaborate with their colleagues so that as a team we provide exemplary care to our patients.

**Dental Assistant Job Description**

**VISION OF THIS POSITION**

The dental assistant is the dentist’s direct link to patients. You set the tone for each appointment by creating a calm, warm and organized experience for patients. You serve as the dentist’s right hand, supporting the clinical needs of our patients under the direction of the dentist.

You engage in purposeful conversations to identify patients’ motivators, concerns and emotions so that patients are enthusiastic about getting the treatment they need. You anticipate and respond to patient questions and concerns, providing both clinical information and personal reassurance. You coordinate with the front office team to ensure seamless scheduling and accurate financial arrangements.

**KNOWLEDGE, SKILLS, AND ABILITIES**

* Relationship building, influencing, creative problem-solving skills
* Computer skills including digital radiographs and practice management software
* Superb verbal skills with patients and staff
* Overall understanding of office philosophy and systems
* Keen understanding of our scheduling and financial systems
* Ability to be a supportive and positive team member
* Excellent clinical skills and charting skills
* Familiarity with the instruments necessary for each procedure and how the dentist likes to be supported
* Overall understanding of all aspects of the back office
* Disinfection and sterilization skills meeting or exceeding OSHA standards
* Motivated to stay up to date on medical, dental and hygiene protocols
* Ability to manage the practice’s clinical inventory systems

**KEY PERFORMANCE STANDARDS**

* Keeps appointments efficient so that XX% of our procedures end on time.
* Abides by our monthly dental supply budget of $XX (or %).
* Sterilizes and turns over rooms in XX minutes.
* Trays are accurate and complete for the procedure XX% of the time.
* Completes charting and patients’ notes within XX minutes/day of patient appointment.
* Radiographs meet our standards XX% of the time.
* Provides informative, actionable hand-offs to the front desk team XX% of the time.

**JOB ROLE**

* Prepares patients for their appointment: reviews health history, takes blood pressure, tooth shade, intraoral photographs. Anticipates and responds to patient’s questions.
* Provides robust handoff to the dentist, in front of the patient, that summarizes patient needs, concerns and motivations.
* Instructs patients on tooth brushing (electric or manual), flossing, perio aides, disclosing, oral rinses, anti-caries products, and nutrition as needed.
* Takes digital radiographs including vertical and horizontal bitewings, periapicals, full mouth series as well as film panoramic as needed.
* Maintains proper sterilization-package instruments in their correct groupings and checks bur blocks for completeness and order.
* Supports the Dr during the procedure through charting and instrumentation.
* Enters detailed and accurate notes about treatment recommendations, tx options.
* Disinfects operatories between procedures, keeps operatories and lab well organized. Properly disposes biohazard bags.
* Ensures that lab cases are checked in and ready. Communicates with the lab to resolve issues.
* Ensures nitrous and oxygen tanks are changed when needed.
* Follows up on progress of referrals/medial consults

**TEAMWORK**

* + Proactively communicates with the front office so they know any changes in treatment and what treatment needs to be done at the next appointment.
  + Participates in staff meetings. Engages in facilitating, training and problem solving
  + Takes initiative to cover gaps when practice is running behind or is understaffed.
  + Assists front office to reply to insurance requests.
  + Assists front office when asked -confirmation calls, med consults and post-op calls
  + Assists hygiene with charting, panos, room turnover, sterilization and other tasks that serve our patients.

**PRACTICE BUILDING**

* Identifies clinical opportunities through chart reviews and relays this information at the huddle.
* Reviews the schedule and makes suggestions on how to improve the choreography of the day. Alerts team to special need patients.
* Debriefs and hands-off patients appropriately so that the front desk knows what was done during the appointment and can assess fees accurately.
* Organizes the back office/sterilization and lab areas so that new and existing employees can quickly be functional.
* Manages the clinical inventory system .
* Promotes the practice by asking patients for a referral/review.
* Contacts patients that made a special impact thanking them for being our patient

**Leadership and Self-Direction**

Our practice is dedicated to continuous learning and mutual support. We value employees who use their initiative to improve the practice and support our growth.

We expect every employee will generously collaborate with their colleagues so that as a team we provide exemplary care to our patients.

**Hygienist Job Description**

**VISION OF THE POSITION**

The hygienist is the mastermind of the practice’s hygiene care program. You partner with the dentist to develop and implement a hygiene program to help our patients understand and become proficient at practicing preventive dentistry. You serve as the “co-pilot” in navigating a patient’s plan for long term, complete care.

You excel in engaging in purposeful conversations with our patients to identify their motivators, concerns and emotions so that patients are enthusiastic about getting the treatment they need. You anticipate and respond to patient questions and concerns, providing both clinical information and personal reassurance.

You collaborate with the front office team to ensure seamless scheduling and accurate financial arrangements. Your overall goal is to work synergistically with the dentist and the team to make sure that every patient receives the best hygiene, restorative and cosmetic care possible.

**KNOWLEDGE, SKILLS AND ABILITIES**

* Passion for and the skills to treat periodontal disease effectively
* Relationship building skills with both staff and patients
* Influencing skills to direct patients to better oral health
* Knowledge of practice management software as it pertains to hygiene, treatment planning, and the ability to convey information to the front office.
* Teamwork and leadership skills
* Enthusiasm for representing and promoting the practice
* Overall understanding of office philosophy and systems
* Excellent organizational skills
* Ability to teach and mentor newer colleagues and educate patients
* Excellent eye-hand coordination skills
* A keen knowledge of hygiene/sterilization concepts
* A full understanding of existing and emerging technologies
* Overall understanding of prosthetic /cosmetic/functional dentistry concepts.

**MEASURES OF SUCCESS**

* Achieve daily goal of XXXX
* Ensure that XX% of patients leave with a scheduled next visit
* XX% of our patient base enrolled in periodontal therapy
* Schedule reflect less than 5% unfilled hours
* XX% case acceptance rate on significant treatment diagnosed in hygiene room
* Ensure that XX % of appointments begin and end on time. Recommended time for appointments are: (list appointment types)

**KEY RESPONSIBILITIES**

**JOB ROLE**

* Greets patients warmly and escorts them to treatment rooms. Helps patients feel comfortable by explaining procedures, answering questions, and addressing their concerns.
* Reviews and updates the patient’s medical history, takes blood pressure, tooth shade, takes diagnostic x-rays including vertical and horizontal bitewings, periapical, full mouth series as well as film panoramic as needed.
* Educates and engages patients while conducting oral cancer exam, TMJ exam, occlusal classification, periodontal exam. Connects patients medical history to their treatment needs.
* Educates patients about their dental health and provides guidance for better home care techniques, anti-caries products, and nutrition.
* Leads purposeful conversations to uncover patients’ motivators and concerns and then links these to treatment recommendations.
* Checks the patient’s progress and records the results on the patient’s chart
* Performs appropriate hygiene procedures to match patients’ clinical needs: Cleans soft and hard deposits, accretions and stains from teeth and beneath

margins of gums using dental instruments, including scaling and root planning for patients with periodontal disease.

* Recognizes and treats early signs of periodontal disease.
* Maintains the appearance, disinfection, and function of the hygiene treatment room, sterilization area, instruments and trays. Sterilizes, oils and sharpens hygiene instruments.
* Enters detailed and accurate notes with all the pertinent discussions of treatment recommendations, options, and timeline.
* Does everything possible to maintain a full schedule and ensures that each patient leaves with a next appointment.
* Informs patient about the reason for return and notes this in the patient’s records for the front desk to access.
* Maintains hygiene supplies and literature.

**TEAMWORK**

* Provides robust handoff to the dentist, in front of the patient, that summarizes patient needs, concerns and motivations.
* Debriefs patients so they understand their tx, escorts and hands them off to the front desk, summarizing treatment decisions and recommendations.
* Proactively communicates with the front office to alert them to treatment changes.
* Participates in staff meetings. Engages in facilitating, training and problem solving. Shares insights and ideas for improvement.
* Takes initiative to cover gaps when practice is running behind or is understaffed.
* Assists front office when asked to do confirmation calls, med consults and post-op calls, reply to insurance requests.
* Collaborates with other clinicians to ensure seamless customer service.

**PRACTICE BUILDING**

* Uses downtime constructively: helps colleagues, contacts patients, sterilizes instruments, initiates projects and continually develops the hygiene department.
* Promotes the practice to patients, asks for referrals and reviews.
* Reviews patients’ needs, identifies treatment opportunities and relays this information at morning huddle and in handoff to dentist at appointment.
* Follows up on progress of referrals/medical consults

**Leadership and Self-Direction**

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**Hygiene Assistant Job Description**

**VISION OF THIS POSITION**

The Hygiene Assistant is the backbone of the hygiene department, enabling us to schedule patients efficiently. You. provide direct support for the hygiene team so that the practice can deliver exceptional oral care to our patients. This role involves assisting with dental procedures, maintaining hygiene standards, and ensuring a comfortable and welcoming environment for patients.

**KNOWLEDGE, SKILLS AND ABILITIES**

* Strong interpersonal and communication skills
* Relationship building and influencing skills
* Excellent attention to detail and organizational skills.
* Proficiency in using dental software
* Knowledge of infection control protocols and sterilization techniques
* Ability to work collaboratively in a fast-paced environment.

**MEASURES OF SUCCESS**

* Achieve hygiene daily goal of XXXX
* Ensure that XX% of patients leave with a scheduled next visit
* Clean and sterilize hygiene rooms within XX minutes
* XX% case acceptance rate on significant treatment diagnosed in hygiene room
* Ensure that XX % of appointments begin and end on time. Recommended time for appointments are: (list appointment types)

**KEY RESPONSIBILITIES**

**JOB ROLE**

* Greets patients warmly and escorts them to treatment rooms. Helps patients feel comfortable by explaining procedures, answering questions, and addressing their concerns.
* Supports hygienists by preparing treatment rooms, handing them instruments, and providing additional assistance as needed.
* Performs and completes hygiene procedures such as polishing, flossing.
* Provides oral hygiene instructions and educates patients on better brushing, flossing, and other oral care techniques.
* Debriefs patients about their appointment and creates value for next visit.
* Maintains accurate patient records, including updating medical histories and treatment information.
* Ensures dental instruments and equipment are properly sterilized and disinfected according to industry standards

**TEAMWORK**

* Reviews patients’ needs, identifies treatment opportunities and relays this information at morning huddle.
* Supports the clinician’s treatment recommendations and responds to patient questions and concerns.
* Debriefs patients so they understand their tx, escorts and hands them off to the front desk, summarizing treatment decisions and recommendations.
* Proactively alerts front office about treatment changes.
* Maintains cleanliness and organization in treatment areas and sterilization room.
* Monitors inventory of dental supplies and notifies when supplies need to be replenished. Assists with ordering supplies as needed.
* Engages in facilitating, training and problem solving at team meetings.
* Takes initiative to cover gaps when practice is running behind or is understaffed.
* Assists front office when needed.
* Collaborates with other clinicians to ensure seamless customer service.

**PRACTICE BUILDING**

* Assists scheduling appointments and managing patient flow.
* Promotes practice by asking for referrals /reviews
* Uses downtime constructively: helps colleagues, contacts patients, sterilizes instruments, initiates projects and continually develops the hygiene department.
* Promotes the practice to patients, asks for referrals and reviews.

**Leadership and Self-Direction**

Our practice is dedicated to continuous learning and mutual support. We value employees who use their initiative to improve the practice and support our growth.

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