Managing the Dental Team
ADA’s Guidelines for Practice Success™ (GPS™)

SAMPLE NEW HIRE CHECKLIST #2

Step 1: Interview
☐ Hiring manager to consult with department lead/coach in determining position requirements and in conducting interviews
☐ Ask appropriate interview questions
☐ Work with office manager to select appropriate candidate to recommend to the dentist

Step 2: Pre-qualification
☐ Determine whether to conduct drug testing and a background check
☐ Verify credential information/privileges

Step 3: Pre-Orientation/Onboarding
☐ Develop training and mentoring schedule
☐ Assign mentor in the appropriate department
☐ Ensure equipment, instruments, materials and other resources are available

Step 4: Orientation
Day 1 – Resource Group:
☐ Human Resource Orientation
☐ Quality Assurance Orientation (as appropriate to the position):
  • Risk management
  • Patient care protocols
  • Patient record documentation protocols
  • Quality assurance protocols
  • Patient record audit process
  • Credentialing/Privileging
  • HIPAA
  • Peer review
  • Malpractice liability
  • Grievance resolution process
  • OSHA
  • Medical emergency protocol
  • Social operating structure
☐ Departmental Orientation (as appropriate to the position):
☐ Roles, responsibilities and expectations
☐ Reporting structure
☐ Periodontal program/caries risk assessment/specialty referrals/preventive care
☐ CDT Code review and clarification
☐ Recare/hygiene scheduling
☐ Patient communication standards
☐ Goals and metrics

Day 1 – Practice:
☐ Orientation to the practice:
  • Introduction to staff
  • Office tour and familiarization
  • Introduction to mentor and dentist
  • Review employee handbook
☐ Shadow mentor
Day 2 – Practice:
- Review office standards with mentor
  - Pre-schedule meeting
  - Greet patients
- Meet with doctors to talk about treatment philosophy
- Review schedule/records for upcoming clinical days

Step 5: Mentoring
Week 1:
- Review relationship within the practice
  - Obtain information from doctors, office manager, and front office and clinical staff
- Discuss practice environment
  - Location, hours, supplies/equipment, and leadership
- Review patient records with a focus on documentation and protocol compliance
- Schedule for next mentoring meeting

1 Month/3 months:
- Review action plan from previous meeting
- Discuss challenges/successes
- Review goals:
  - Productivity
  - Time utilization