

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/carries 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

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