

Office Manual

Position Descriptions

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Administrator Position Description

Reports to: Office Manager

Summary

Incumbent is trained and experienced to provide bookkeeping, record-keeping, and clerical duties and has personal characteristics to be a professional and personable administrator. This person is a major link between the practice, all patients, and the general public. Duties include using the telephone, making and adjusting all appointments, making entries in patient records, accurately completing financial transactions, some typing, and other practice-related matters. Performs other duties related to the job as may occasionally be required. Administrators work under the supervision of the Office Manager.

Duties

- Answers the telephone and checks voice mail. Makes telephone calls to make appointments, remind patients of appointments, reschedule patients, and other related reasons. Checks or looks up telephone numbers. Responds to inquiries about appointments, treatment, insurance coverage, and administrative matters. Takes complete messages for dentists for return calls. (Only special and emergency calls are permitted to interrupt dentists during treatment).
- Schedules appointments for all practice day and evening patients. Enters information in appropriate spaces in appointment book using the first available time. Changes appointments per practice policy and procedures. Inserts emergency patients in daily schedule, pulls charts, and adds the patient name to the schedule. Prepares the daily schedule for the next day.
- Re-checks status of all medically compromised patients during appointment confirmation phone calls (and in person): validates precautionary measures and/or contraindications to treatment prior to the appointment. Consults the treating physician when necessary, informs treating dentist verbally and makes a note in the chart.
- Accepts history form from patients, completes forms when necessary. Prepares proper chart jacket and inserts history form for all new patients. Organizes history forms so assistants can file them in proper charts.
- Pulls chart for all patients scheduled for the next day, assures that each is in good condition and is current. Searches for missing charts. Checks contents of each chart for completeness. Inserts new forms as necessary to be completed by the patient prior to the appointment. Confirms proper chart for all patients (especially when several patients have the same name). Sets up patient sign-in sheet.
- Checks most recent list of patients covered by Consumer Dental Care and Aetna U.S. Healthcare.
- Receives payment directly from patients. Records fee properly in the system. Enters next appointment in the ledger, gives a receipt to the patient and verbally confirms the appointment. Completes sticker for next appointment for the patient. Accepts cash, checks, Visa, and MasterCard payments. Accepts payments by mail and from insurance carriers. Endorses checks.
- Closes out day sheets: compares all entries and checks for accuracy, adds appropriate columns, deposit amounts and checks, cash and charge slips, enters figure in trial balance section. Rechecks all entries to balance figures. Checks deposit slips against checks, cash, and charges, confirms that all checks and credit card forms are prepared for deposit, gives the day sheet, computer summary, deposit, and receipt forms in chronological order to the Office Manager.
- Greets all patients. Responds to any and all questions about the schedule, appointments, treatment and fees (prior to and following treatment).
- Prints insurance forms daily. Checks for date, procedure code, procedure description, tooth/teeth number(s), and patient information. Stamps with signature.
- Makes appointments for patients with in-office specialists. Gives referral slips to patients when referred out of practice, sends copies of radiographs to outside specialist practices with request for consultation information, return of radiographs, and related matters. Files returned radiographs and information requested.
- Receives work from dental laboratories. Receives UPS and other deliveries, confirms delivery, and pays amount owed (or gets approval and check from the Office Manager).
- Maintains cleanliness and order of the front desk. Periodically straightens the reception room.
- Actively markets the practice according to practice policies and procedures.

Employment Standards (to be added)

Agreements (to be checked/edited)

I have read the above statements and have had the opportunity to make revisions and have all questions answered to my satisfaction. I understand that the above statements are general guidelines and do not encompass all facets of my position. I, by signing below agree that these statements as listed provide for the baseline tenements for my position as a Hygienist at Dental Health Associates PA.

Employee Signature _____

Administrator Performance Appraisal

Rating Form

Employee _____ Rater _____ Date _____

Period of Appraisal _____

| Factors | Points | | | | |
|---|--------|----|----|----|----|
| 1) Professional Demeanor (dress, bearing) | 40 | 50 | 60 | 70 | 80 |
| 2) Punctuality (reports to work, leaves work) | 40 | 50 | 60 | 70 | 80 |
| 3) Patient Relations (pleasant, congenial, caring) | 40 | 50 | 60 | 70 | 80 |
| 4) Relations with other Staff (cooperative, teamworker) | 40 | 50 | 60 | 70 | 80 |
| 5) Quantity of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 6) Quality of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 7) Supports goals of the Practice (collections) | 40 | 50 | 60 | 70 | 80 |
| 8) Position Skills (abilities) | 40 | 50 | 60 | 70 | 80 |
| 9) Position Responsibilities | 40 | 50 | 60 | 70 | 80 |
| | | | | | |
| a. Answers telephone | 40 | 50 | 60 | 70 | 80 |
| b. Schedules appointments | 40 | 50 | 60 | 70 | 80 |
| c. Rechecks compromised patients | 40 | 50 | 60 | 70 | 80 |
| d. Accepts history form | 40 | 50 | 60 | 70 | 80 |
| e. Pulls charts | 40 | 50 | 60 | 70 | 80 |
| f. Prepares routing control forms | 40 | 50 | 60 | 70 | 80 |
| g. Receives payments | 40 | 50 | 60 | 70 | 80 |
| h. Closes out day sheets | 40 | 50 | 60 | 70 | 80 |
| i. Greets all patients | 40 | 50 | 60 | 70 | 80 |
| j. Files insurance forms | 40 | 50 | 60 | 70 | 80 |
| k. Assists with the recall system | 40 | 50 | 60 | 70 | 80 |
| l. Receives work from labs | 40 | 50 | 60 | 70 | 80 |
| m. Maintains list of CDC and Aetna pts | 40 | 50 | 60 | 70 | 80 |
| n. Maintains front desk | 40 | 50 | 60 | 70 | 80 |
| o. Uses computer | 40 | 50 | 60 | 70 | 80 |
| p. Actively markets the practice | 40 | 50 | 60 | 70 | 80 |

Additional Administrator Job Descriptions

Appointment Coordinator

Purpose: The Appointment Coordinator's responsibility is to ensure a high volume of quality patients into the office and to ensure all existing patients arrive into the office and do not "slip through the cracks." This is primarily done through:

- Scheduling
- Rescheduling
- Reactivation of inactive patients
- New patient flow and marketing activity
- Excellent people skills with the patients

Statistics:

- # of office visits:
- Production:
- % of missed appts: # of appts kept divided the number of appts.
- % of missed appts rescheduled: # of the missed appts rescheduled.

Basic duties:

- 1) Scheduling
 - a. Confirming patients
 - b. Scheduling protocol
 - c. Phone scripts, phone protocol
- 2) Patient Management:
 - a. New patient forms.
 - b. Existing patient updates.
- 3) Recall
 - a. Sending recall cards
 - b. Confirming all patients
- 4) Reactivation of inactive patients.
 - a. Please see ExecTech reactivation letter (or other letters)
 - b. Reactivation calls following the reactivation letter
- 5) Handling/rescheduling missed appointments
 - a. Maintaining the missed appointment log
- 6) Marketing:
 - a. Expanding the patient referrals
 - i. Care Enough to Share referrals program
 - b. Ensuring a pleasant front office atmosphere
 - c. Maintains supply of needed education materials and flyers.
 - d. Ensuring front office cleanliness, magazines, etc.
- 7) Other
 - a. Pulling routine charts
 - b. Backing up the Insurance Coordinator and other front office staff with checkout, collections, entering new patient/insurance date, verifying insurance, etc.

The appointment coordinator will personally schedule most patients (backup staff members will occasionally schedule appointments when the appointment coordinator is unavailable).

Patients will be scheduled with two goals in mind:

- To maximize production
- To facilitate a smoothly running day

The appointment coordinator's paramount goal is to facilitate a perfectly running, highly productive schedule. Nothing else is more important. The schedule affects the office's day more than anything else.

Checkout Coordinator

Purpose: The Checkout Coordinator's responsibility is to all patients leaving the office are efficiently and properly handled with respect to:

- Payments, co-pays, amount due, etc.
- Financial responsibilities; the practice financial policy
- Next appointment scheduling; often done by Appt Coordinator

Statistics:

- Counter Collections

Basic duties:

- 1) Checkout:
 - a. Cash collections, co-pays, patient portion, etc.
 - b. Understands and can explain the practice financial policy
 - c. Works out payment options with patients
 - d. Coordinates patients with financial institutions such as Care Credit.
- 2) Financial Policy:
 - a. Ensures no patients start treatment (plans over \$500) without understanding their obligations, and, without agreeing in writing to a payment method.
- 3) Computer:
 - a. Posts the treatment and payments into the computer
 - b. Enters in new patient information when necessary
 - c. Assists the appointment coordinator in scheduling patient appointments
- 4) Checkout:
 - a. Schedules patients' next appointment, or sends to the appointment coordinator for scheduling.
 - b. Files completed charts
- 5) Other:
 - a. Backing up the Appointment Coordinator/other front office staff with answering the phone, scheduling, pulling random charts as needed, PR, properly welcoming patients, etc
 - b. Informs Office Manager of needed front office supplies.

Insurance Coordinator

Purpose: The Insurance Coordinator's responsibility is to ensure accurate and complete administration of the use of insurance plans for the practice. The result is a high collection percentage, high income, and a smooth understanding for all staff and patients regarding insurance plans accepted by the practice. This is done primarily by:

- A very high understanding of all insurance plans.
- Ensuring patients pay their co-pay, patient portions, or other patient responsibilities in advance and accurately.
- Ensuring all front office staff do not cause "lost income" by mishandling insurance questions and or collections.
- Ensuring accurate insurance billing procedures and aggressively collecting on slow or "no" insurance claims.
- Etc.

Statistics:

- Insurance income
- Collections percentage.

Basic duties:

- 1) Insurance:
 - a. Insurance verification
 - b. Collecting from insurance companies
 - c. Sending claims
 - d. Collecting on slow or "no" payments.
- 2) Assisting to ensure quick collections by checkout coordinator.
 - a. Backs up checkout
 - b. Ensures co-pays, patients portions, etc are accurate and collected.
 - c. Educates front office on insurance, as needed.
 - d. Answers questions regarding insurance.
- 3) Computer:
 - a. Enters new patient info into the computer (often done by appointment coordinator)

- b. Analyzes insurance plans.
 - c. Enters PPO fee schedules
 - d. Analyzes and ensures practice fee schedule is viable.
- 4) Other:
- a. Backs up checkout and scheduling, if possible.
 - b. Files completed charts
 - c. Backing up the appointment coordinator/other front office staff with answering the phone, scheduling, pulling random charts as needed, PR, properly welcoming patients, etc.

Front Desk Manager (FDM) Position Description

Reports to: Office Manager

Summary

Incumbent has working knowledge of financial and personnel management and dental practice office systems. Manages and monitors all administrative and clinical activities of the practice. Exhibits leadership behavior consistent with commitment to the practice. This person is the major link between the owner, the clinical and administrative staff, all patients and the general public. Duties include supervising activities of the front desk, completing financial transactions, practice marketing, and other practice-related matters. Coordinates clinical activities with the dentists, hygienists, and the reception desk.

Duties (version 1, needs to be edited)

- Manages and monitors all administrative and clinical activities of the practice; delegates appropriate tasks to business staff, clinical staff, hygienists, and associates consistent with position descriptions. Coordinates the scheduling of all treatment rendered in the practice. Reviews the records of all patients referred to the practice. Reviews numbers of referrals out of practice to specialists.
- Actively markets the practice and capabilities of associates and staff in order to increase the patient population. Develops professional methods to reach and attract patients from varied community populations and to retain current patients. Contributes to the practice newsletter.
- Works with the owner to monitor effectiveness of improvements to scheduling, bookkeeping, collections, inventory control, and other practice policies and procedures.
- Supervises completion of all day sheets and checks all deposits.
- Manages administrative functioning of practice and activities of staff and associates. Assists owner to recruit, interview, check references, and hire staff. Solicits opinion and help from staff. Counsels regularly with staff about job performance. Develops agenda for and conducts regularly scheduled (monthly) staff meetings.
- Develops, manages, and monitors practice policies and procedures for quality assurance and asepsis control.
- Closes out day sheets. Checks and completes all day sheets. Adds appropriate columns.
- Answers all requests for copies of patient charts from patients, attorneys, other dentists, and other professionals.
- Uses computer to perform managerial and marketing functions daily or as required. Generates periodic financial reports including aging Accounts Receivable.
- Approves all orders for dental supplies.
- Performs limited, general administrative work. May run local errands to the bank, supermarket, retail stores, and post office. Always maintains professional demeanor and confidentiality of patient information and interaction.
- Daily deposit (Copying checks, verify accuracy, prepare deposit)
- Daily review of Routing Control Forms (review and correct prior days forms)
- Daily check out of patients
- Schedule patients for appointments
- Treatment plans as needed
- Assist in answering phone and patient inquiries)
- Handle all questions thrown at front desk (i.e. complaint calls, patient disputes)
- Set up payment plans for patients
- Handle the A/R for the office (Collections, OTC collections on prior balances)
- Settle Credit card machine at the end of the day
- Tabulate all corrections & formulate plan to decrease "error" ratio.
- Ensure all treatment plans for new patients are in computer
- Ensure new patient log filled out and up to date **
- Ensure target goals (New patients, scheduled production)
- Review daily schedule three days ahead and track
- Ensure appointments are confirmed 2 days out
- Ensure late cancellations and failures have notes and are charged accordingly
- Review daily tab report to correct input errors
- Ensure insurance processed and filed daily
- Review outstanding accounts for internal errors for accounts over 90 days
- Review patients portions OTC equal 100% daily
- Training of new employees

Duties (version 2, needs to be edited)

Beyond the normal, daily on-going tasks of administrator, which include:

- Answering Phones
- Patient Processing
- Filing
- Check-out

The scope of your duties will take on added responsibility reflecting your merit and increased pay. Briefly outlining these is as follows:

- New Patient Coordination – please format and run a list of all new patients per week whose treatment plans you have completed, entered and catalogued. Please also refer to Puspa regarding new patient greeting letters. The report will be due to Puspa or Dr. Wolcott no later than Monday afternoon of every week.
- X-Rays and Restorative Appointments – the x-ray box containing specialist correspondence (x-rays of completed root canals, etc.) will now be your responsibility. Please generate a list that includes patients who have received treatment and are in need of restorative appointments. Please also make a notation in the patient's ledger noting that we have received confirmation for the specialist treatment. A list of these patients, their necessary appointments and any appointments that have been scheduled for them (restorations) should be given to both Jennifer and Puspa weekly, no later than Wednesday of each week. You must also place any pending appointments on the Call List in Discus Dental so that we may pull up schedules and accommodate patients with special timing needs.
- Cap Lists – there has been an issue with the parameters and accuracy of the cap lists, which you have assumed control of. Please keep extensive records regarding specific dates on which utilization reports are run and cap lists are verified. Contractually, the cap lists are generated in the first to second week of every month. It is necessary that you complete these tasks as soon as the lists come in. These are due to Poupak or Puspa upon completion but no later than the 20th of every month. Because of errors that have occurred in previous lists, Poupak and Puspa will be re-checking to make sure our benefits match the insurance generated lists. Accuracy here is the key.

Personnel:

- Hiring
- Personnel Files
- Benefits
- Statistics

Marketing Manager:

- New Patients
- Marketing Projects
- Advertising

Appointments:

- Appointments
- Production booked
- Recall (Cards, Confirmations)
- Reactivation (Letters, calls)
- Daily Deposits
- Stats:
 - Total Production
 - % Appt Kept
 - % Missed appts/Rescheduled
 - Recall/Reactivation cards out

Insurance:

- Insurance Entry
- Insurance Collections
- Verification of Coverage
 - Collections %
 - Insurance Income
 - Production vs. Collection %

Financial (Check Out):

- Check out Patients
- OTC Collections
- Chart Filing
- File Maintenance
 - OTC Collection %
 - % Patients schedule

Employment Standards (to be added)

Agreements (to be checked/edited)

I have read the above statements and have had the opportunity to make revisions and have all questions answered to my satisfaction. I understand that the above statements are general guidelines and do not encompass all facets of my position. I, by signing below agree that these statements as listed provide for the baseline tenements for my position as a Hygienist at Dental Health Associates PA.

Employee Signature _____

Front Desk Manager Performance Appraisal

Rating Form

Employee _____ Rater _____ Date _____

Period of Appraisal _____

| Factors | Points | | | | |
|--|--------|----|----|----|----|
| 1) Professional Demeanor (dress, bearing) | 40 | 50 | 60 | 70 | 80 |
| 2) Punctuality (reports to work, leaves work) | 40 | 50 | 60 | 70 | 80 |
| 3) Patient Relations (pleasant, congenial, caring) | 40 | 50 | 60 | 70 | 80 |
| 4) Relations with other Staff (cooperative) | 40 | 50 | 60 | 70 | 80 |
| 5) Quantity of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 6) Quality of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 7) Supports goals of the Practice (collections) | 40 | 50 | 60 | 70 | 80 |
| 8) Position Skills (abilities) | 40 | 50 | 60 | 70 | 80 |
| 9) Position Responsibilities | 40 | 50 | 60 | 70 | 80 |
| | | | | | |
| a. Manages front desk and receptionists | 40 | 50 | 60 | 70 | 80 |
| b. Uses computer | 40 | 50 | 60 | 70 | 80 |
| c. Bills patients | 40 | 50 | 60 | 70 | 80 |
| d. Receives payments by mail | 40 | 50 | 60 | 70 | 80 |
| e. Receives insurance payments by mail | 40 | 50 | 60 | 70 | 80 |
| f. Orders clerical supplies | 40 | 50 | 60 | 70 | 80 |
| g. Assists with personnel staffing | 40 | 50 | 60 | 70 | 80 |
| h. Actively markets the practice | 40 | 50 | 60 | 70 | 80 |

Additional Front Desk Manager Job Descriptions

New Patient Coordinator

Purpose: To track all new patients and ensure all prescribed care is provided in a timely manner

New Patient Treatment Plan and Letters (Working Days)

- NPE Schedule Day 0
- Dentist writes treatment plan Day 1
- Admin puts treatment plan in the computer Day 1
- Present draft to dentist Day 2
- Correct draft Day 2
- Present dentist with corrected treatment plan Day 3
- Finalize letter Day 4
- Send to patient Day 5
- Treatment consult with patient and dentist Day 10
- Financial arrangement Day 10

New Patient Report: Weekly on Tuesday before lunch

- List all new patients
 - Group by
 - 1) NPE vs. LOE
 - 2) Sub-Group by Patient Type (N – I – O – 1 – 2 – DMO)

Check Boxes for NPE

- Treatment Plan in computer
- Ref to Specialist
- Hygiene appointment set
- Hygiene treatment complete
- Restorative appointment set
- Restorative treatment complete

Maintain Monthly Lists for NPE in one folder

- Grouped by Patient Type
- Cross of patient name when treatment complete
- Update list weekly
- Tuesday each week add names to master monthly list
- Make follow-up phone calls daily
- Provide assembled monthly and year to date (YTD) report to Office Manager or Dr. Wolcott on second Tuesday of each month that will include
 - Total Patients (Sub-Group by Type)
 - Total Treatment Complete (Sub-Group by Type)
 - Total Unfinished Treatment (Sub-Group by Type)
 - List Name (Grouped by Month)

Note:

Ensure treatment plans are put in on computer that has Clinical Vision!

Determine if this information can be determined by Dental Vision Report (it should be possible)

Qualified Dental Assistant Position Description

Reports to: Clinical Manager

Summary

The qualified dental assistant should refer to **COMAR** for a description of legally permitted tasks. Incumbent is trained and experienced to assist at chairside for dentists and in laboratory. Prepares operatory and patient, prepares various materials and medicaments, prepares impressions for lab, exposes and develops X-rays, assists at chairside, sits or stands as appropriate, uses autoclave and other appliances, orders and receives practice supplies. Assists periodically at reception desk. Performs other dental-related duties as may occasionally be required.

Duties

- Prepares operatory for treatment according to practice policies and state regulations. Places patient chart, tub, pre-set tray and lays out required extra instruments, supplies and medicaments to be used in treatment. Checks operatory for cleanliness. Checks daily schedule for patient appointment times. Checks charts for treatment required (does patient need prophylaxis, etc.?)
- Opens chart for treating dentists; consults chart for procedure(s) scheduled. Greets patients in reception room, escorts to chair, seats and drapes. Requests patient to rinse with Listerine for 30 seconds. Engages patient in friendly conversation. Reviews medical history, personal data and impending treatment with patient and any symptoms. Gives patient forms to complete when appropriate. Remains in operatory with patient. Introduces patient to treating dentist.
- Assists dentist at chairside by transferring instruments using SD4H procedures, monitors patient general condition. Charts dental condition of patient and treatment to be rendered. Mixes dental impression materials and cements. Assists with light-cured resins. Anticipates next step in treatment and prepares matrix band, wedge, and other requirements (trituration amalgam, fills carrier) and passes to dentist. Uses high speed suction, rinses patient's mouth, dries treatment area. Remains at chairside until treatment is completed; maintains attention to interaction and treatment; assures patient with pleasant social conversation. Wears approved eye protection, mask and gloves; uses aseptic techniques.
- Takes patient, completed chart and routing control form to reception desk ; instructs patient and receptionist regarding next appointment and/or post-op care, says "goodbye" to patient, returns to operatory. Completes administrative data on prescription sheets. Completes follow-up call sheet for all patients who may have post-treatment discomfort; gives to treating dentist.
- Assists other assistants with seating patients, taking X-rays, cleaning operatories, cleaning lab and cleaning darkroom during own slow periods.
- Cleans dental operatories following treatment and at the end of the day according to practice policies and state regulations. Takes used instruments and burs from counter to sterilization area, places in ultrasonic cleaner, dries, bags (labels bags with contents and seals), takes to statim or autoclave. Uses Birex to clean counter tops, patient chair handpieces and air-water syringe, changes suction tips. Flushes handpieces and air-water syringe, changes suction tips. Flushes handpieces and air-water syringes, lubricates handpieces, bags and places in statim. (Spray, wipe, spray; use green rubber gloves). Places fresh barrier tape on designated places. Opens autoclave, removes bags to cool, returns bags to proper place in proper operatory and in Central Sterilization Area. Removes plastic from bracket tab, swabs counter, chair arms, tray, handpieces and syringe with Birex. Removes old magazines. Cleans mirror. Replaces headrest cover and tray cover with plastic, cleans debris from floor, cleans sink, inspects.
- Loads and unloads statim or autoclave. Returns instruments to drawer and operatory cabinets in either pre-set trays, tubs or bags. Returns burs to bur block in proper sequence.
- Restocks tubs and trays. Checks tubs for standard contents, refills to maintain readiness. Checks and re-sets trays with proper instruments for specific procedures. Stores in proper location in Central Sterilization Area. Identifies instruments with proper tape color.
- Labels and codes all chemicals. Collects all information needed to complete MSDS sheets. Completes MSDS sheets.
- Exposes, develops, mounts radiographs including cephalometric and panorex. Replenishes X-ray developer and fixer solutions daily. Changes X-ray developer and fixer solutions according to standard. Maintains neatness and cleanliness of darkroom, darkroom tanks and Perio-Pro.
- Schedules laboratory cases to coincide with appointment. Completes lab work requests; makes entry on daily lab sheet and telephones lab regarding pick-up. Coordinates lab activities with receptionist for pick-up and returns. Checks returned lab cases.
- Cleans and maintains order in Central Sterilization Area according to practice policy and procedures. Stores supplies neatly when received. Recycles lab case containers; bags and labels inactive cases and stores, relabels containers and inserts current patient models and trays. Restocks supplies of lab materials used regularly, cleans and stores trays, removes trash, and regularly maintains lab in clean and orderly condition. Changes compressor filters.

- Maintains asepsis and cleanliness in operatories daily using Birex. Flushes and lubricates handpieces daily. Empties main suction trap weekly.
- Pours and trims study models.
- Sharpens hand instruments as required at chairside; regularly inspects instruments and sharpens weekly.
- Complies with all OSHA standards.
- Switches compressors and lights on and off as required. Empties trash compactor regularly. Properly disposes of amalgam scraps.
- Always maintains professional demeanor and confidentiality of patient information and interaction.
- Assists at front desk occasionally. Answers telephones, changes or cancels appointments.
- Actively markets the practice.

Employment Standards

- Graduate of accredited chairside assistant training program or 1 year of equivalent experience in active SD4H, general dentistry practice.
- X-ray Certified (Qualified) and able to assist with all general dentistry procedures, prosthetic, endodontic and surgical procedures and all materials generally used.
- Reads charts. Understands dental terminology, anticipates treatment and separate procedures in treatment.
- Works effectively with varied patients including children, geriatric, and handicapped.
- Uses amalgamator, manual X-ray developing system, visible light system, alginator, ultrasonic cleaner, driclave and autoclave and related equipment.
- Emotionally capable of working continuously with several dentists, other staff members and under varying conditions of stress during periods of high volume productivity. Sits, bends, stoops, stands continuously. Lifts up to 25 pounds periodically.
- Professional demeanor, self-motivated teamworker. Personally neat and clean. Takes CE courses for own professional development. Belongs to professional associations.
- Works under services of Clinical Services, two or more dentists and with hygienist, receptionists, and other chairside assistants.

Agreements (to be checked/edited)

I have read the above statements and have had the opportunity to make revisions and have all questions answered to my satisfaction. I understand that the above statements are general guidelines and do not encompass all facets of my position. I, by signing below agree that these statements as listed provide for the baseline tenements for my position as a Hygienist at Dental Health Associates PA.

Employee Signature _____

Qualified Dental Assistant Performance Appraisal

Rating Form

Employee _____ Rater _____ Date _____

Period of Appraisal _____

| Factors | Points | | | | |
|--|--------|----|----|----|----|
| 1) Professional Demeanor (dress, bearing) | 40 | 50 | 60 | 70 | 80 |
| 2) Punctuality (reports to work, leaves work) | 40 | 50 | 60 | 70 | 80 |
| 3) Patient Relations (pleasant, congenial, caring) | 40 | 50 | 60 | 70 | 80 |
| 4) Relations with Staff (cooperative, teamworker) | 40 | 50 | 60 | 70 | 80 |
| 5) Quantity of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 6) Quality of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 7) Supports goals of practice (collections, referrals) | 40 | 50 | 60 | 70 | 80 |
| 8) Position Skills (abilities) | 40 | 50 | 60 | 70 | 80 |
| 9) Position Responsibilities | 40 | 50 | 60 | 70 | 80 |
| a. Opens office | 40 | 50 | 60 | 70 | 80 |
| b. Meets with staff | 40 | 50 | 60 | 70 | 80 |
| c. Prepares operatory | 40 | 50 | 60 | 70 | 80 |
| d. Greets patients | 40 | 50 | 60 | 70 | 80 |
| e. Assists dentist at chairside | 40 | 50 | 60 | 70 | 80 |
| f. Takes impressions | 40 | 50 | 60 | 70 | 80 |
| g. Exposes, develops, mounts X-rays | 40 | 50 | 60 | 70 | 80 |
| h. Writes entries in patient chart | 40 | 50 | 60 | 70 | 80 |
| i. Cleans dental operatory | 40 | 50 | 60 | 70 | 80 |
| j. Loads and unloads driclave/autoclave | 40 | 50 | 60 | 70 | 80 |
| k. Restocks tubs and trays | 40 | 50 | 60 | 70 | 80 |
| l. Replenishes x-ray developer | 40 | 50 | 60 | 70 | 80 |
| m. Lubricates handpieces | 40 | 50 | 60 | 70 | 80 |
| n. Schedules laboratory cases | 40 | 50 | 60 | 70 | 80 |
| o. Collects inventory requirements | 40 | 50 | 60 | 70 | 80 |
| p. Cleans/maintains Central Sterilization | 40 | 50 | 60 | 70 | 80 |
| q. Supervises ordering dental supplies | 40 | 50 | 60 | 70 | 80 |
| r. Maintains asepsis | 40 | 50 | 60 | 70 | 80 |
| s. Fabricates custom trays | 40 | 50 | 60 | 70 | 80 |
| t. Sharpens hand instruments | 40 | 50 | 60 | 70 | 80 |
| u. Switches compressors and lights | 40 | 50 | 60 | 70 | 80 |
| v. Shares cleaning responsibilities | 40 | 50 | 60 | 70 | 80 |
| w. Maintains professional demeanor | 40 | 50 | 60 | 70 | 80 |
| x. Assists at front desk | 40 | 50 | 60 | 70 | 80 |
| y. Works with orthodontist | 40 | 50 | 60 | 70 | 80 |
| z. Supervises order in Central Sterilization | 40 | 50 | 60 | 70 | 80 |
| aa. Supervises staff | 40 | 50 | 60 | 70 | 80 |
| bb. Performs limited administrative work | 40 | 50 | 60 | 70 | 80 |
| cc. Supports periodontist | 40 | 50 | 60 | 70 | 80 |
| dd. Closes office | 40 | 50 | 60 | 70 | 80 |
| ee. Always maintains professional demeanor | 40 | 50 | 60 | 70 | 80 |
| ff. Actively markets the practice | 40 | 50 | 60 | 70 | 80 |

Chairside Assistant Position Description

Reports to: Clinical Manager

Summary

This position is for a chairside assistant and NOT a qualified dental assistant and as such cannot perform the same tasks as a qualified dental assistant (See **COMAR**). Incumbent is trained and experienced to assist at chairside for dentist and hygienist in laboratory. Prepares operatory and patient, prepares various materials and medicaments, prepares impressions for lab, performs sealant therapy, assists at chairside, sits or stands as appropriate, uses autoclave and other appliances, orders and receives practice supplies. Assists periodically at reception desk. Performs other dental-related duties as may occasionally be required.

Duties

- Prepares operatory for treatment. Places patient chart, tub, pre-set tray and lays out required extra instruments, supplies and medicaments to be used in treatment. Checks operatory for cleanliness. Checks daily schedule for patient appointment times.
- Greets patients in reception room, escorts to chair, seats, drapes, and remains with patient. Engages patient in friendly conversation. Opens chart for treating dentists; consults chart for procedure scheduled. Reviews medical history, personal data and impending treatment with patient and any symptoms. Gives patient forms to complete when appropriate. Remains in operatory with patient. Introduces patient and treating dentist.
- Assists dentist at chairside by transferring instruments using SD4H procedures, monitors patient general condition. Charts dental condition of patient and treatment to be rendered. Mixes dental impression materials, cements and amalgam. Assists with light-cured resins. Anticipates next step in treatment and prepares matrix band, wedge, and other requirements, (tritirates amalgam, fills carrier) and passes to dentist. Uses high speed suction, rinses patient's mouth, dries treatment area. Remains at chairside until treatment is completed; maintains attention to interaction and treatment; assures patient with pleasant social conversation and by informing patient about current procedure and next step. Wears approved eye protection, mask and gloves; uses aseptic techniques.
- Assists hygienist at chairside. Charts dental condition of patient and treatment to be rendered. Assists with fluoride treatment. Maintains attention to treatment and interaction. Moves hygiene patient from treatment to check-up operatory, remains with patient. Writes diagnosis and treatment plan and schedule for dentist use following cleaning. Cleans operatory following treatment. Lists treatment information on recall card. Gives stickers or balloons for young patients.
- Writes entries in patient chart for dentist or hygienist according to practice policy and procedure. Takes patient, completed chart and routing control form to reception desk; gives instructions to patient and/or receptionist regarding next appointment and/or post-op care, says "good-bye" to patient, returns to operatory. Completes administrative data on prescription sheets.
- Cleans dental operatory following treatment and at the end of the day. Takes used instruments and burs from mobile cart to operatory sink, places in ultrasonic cleaner, scrubs, dries, bags (labels bags with contents and seals), takes to driclave or autoclave. Uses alcohol swab to clean countertops, patient chair, handpieces, and air-water syringe, changes suction tips.
- Loads and unloads driclave or autoclave. Returns instruments to mobile cart and operatory cabinets in either pre-set trays, tubs or bags. (Returns burs to bur block in proper sequence).
- Restocks tubs and trays. Checks tubs for standard contents, refills to maintain readiness. Checks and re-sets trays with proper instruments for specific procedures. Stores in proper location in Central Sterilization Area. Identifies instruments with proper tape color.
- Replenishes X-ray developer and fixer solutions daily. Changes X-ray developer and fixer solutions according to standard. Maintains neatness and cleanliness of dark room, dark room tanks and Perio-Pro.
- Lubricates all low speed and the high-speed handpieces that require oil. Lubricates prophylaxis tips. Rewipes with alcohol swab. Performs weekly.
- Schedules laboratory cases to coincide with patient appointment in patient chart. Completes lab work requests; makes entry on Daily Lab Sheet and telephones lab regarding pick-up. Coordinates lab activities with receptionist for pick-up and returns. Checks returned lab cases.
- Collects inventory requirements form staff, collates requirements into supply orders once each week. Writes orders (or telephones orders), sends order with check to mail order supplier. Keeps track of orders and expected date of delivery. Receives orders, unpacks, checks against original order and invoice, places in storage. Processes back orders. Purchases some supplies from supermarket (paper products, soap, etc.) stores, replaces when necessary.
- Cleans and maintains order in Central Sterilization area according to practice policy and procedures. Stores supplies neatly when received. Recycles lab case containers; bags and labels inactive cases and stores, re-labels containers and inserts current patient models and trays. Restocks supplies of lab materials used regularly, cleans and stores trays, removes trash, vacuums dust and regularly maintains lab in clean and orderly condition. Changes compressor filters.

- Maintains asepsis and cleanliness in operatories weekly using standard germicidal. Flushes and lubricates handpieces daily. Empties main suction trap daily.
- Fabricates custom trays. Pours and trims study models.
- Sharpens hand instruments as required at chairside; regularly inspects instruments and sharpens weekly.
- Switches compressors and lights on and off as required. Empties practice trash regularly. Properly disposes of amalgam scraps.
- Shares cleaning responsibilities in staff lounge and bathroom. Washes dishes and silverware, bags garbage and removes. Washes sink, wipes tables, keeps refrigerator and contents in order.
- Always maintains professional demeanor and confidentiality of patient information and interaction.
- Assists at front desk occasionally. Answers telephones, makes changes, cancels appointments, takes and refers messages to dentists and staff.
- Actively markets the practice according to practice policy and procedures.

Employment Standards

- Graduate of accredited Chairside Assistant training program and/or 1 year of equivalent experience in active SD4H, general dentistry practice.
- Qualified or certified and able to assist with all general dentistry procedures, prosthetic, endodontic, and surgical procedures and all materials generally used.
- Reads charts. Understands dental terminology, anticipates treatment and separate procedures in treatment.
- Works effectively with varied patients including children, geriatric, and handicapped.
- Uses amalgamator, manual X-ray developing system, visible light system, alginate, ultrasonic cleaner, driclave and autoclave and related equipment.
- Emotionally capable of working continuously and effectively with varied patients, several dentists, other staff members and under varying conditions of stress during periods of high volume productivity. Sits, bends, stoops, stand continuously. Lifts up to 25 pounds periodically.
- Professional demeanor, self-motivated teamworker. Personally neat and clean. Takes CE courses for own professional development. Belongs to professional associations.
- Works under supervision of Chairside Assistant Supervisor, two (or more) dentists and with hygienist, receptionist, and other chairside assistants.

Agreements (to be checked/edited)

I have read the above statements and have had the opportunity to make revisions and have all questions answered to my satisfaction. I understand that the above statements are general guidelines and do not encompass all facets of my position. I, by signing below agree that these statements as listed provide for the baseline tenements for my position as a Hygienist at Dental Health Associates PA.

Employee Signature _____

Chairside Assistant Performance Appraisal

Rating Form

Employee _____ Rater _____ Date _____

Period of Appraisal _____

| Factors | Points | | | | |
|--|--------|----|----|----|----|
| 1) Professional Demeanor (dress, bearing) | 40 | 50 | 60 | 70 | 80 |
| 2) Punctuality (reports to work, leaves work) | 40 | 50 | 60 | 70 | 80 |
| 3) Patient Relations (pleasant, congenial, caring) | 40 | 50 | 60 | 70 | 80 |
| 4) Relations with Staff (cooperative, teamworker) | 40 | 50 | 60 | 70 | 80 |
| 5) Quantity of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 6) Quality of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 7) Supports goals of practice (collections, referrals) | 40 | 50 | 60 | 70 | 80 |
| 8) Position Skills (abilities) | 40 | 50 | 60 | 70 | 80 |
| 9) Position Responsibilities | 40 | 50 | 60 | 70 | 80 |
| a. Prepares operatory | 40 | 50 | 60 | 70 | 80 |
| b. Greets patients | 40 | 50 | 60 | 70 | 80 |
| c. Assists dentist at chairside | 40 | 50 | 60 | 70 | 80 |
| d. Writes entries in patient chart | 40 | 50 | 60 | 70 | 80 |
| e. Cleans dental operatory | 40 | 50 | 60 | 70 | 80 |
| f. Loads and unloads driclave/autoclave | 40 | 50 | 60 | 70 | 80 |
| g. Restocks tubs and trays | 40 | 50 | 60 | 70 | 80 |
| h. Replenishes X-ray developer | 40 | 50 | 60 | 70 | 80 |
| i. Lubricates handpieces | 40 | 50 | 60 | 70 | 80 |
| j. Schedules laboratory cases | 40 | 50 | 60 | 70 | 80 |
| k. Collects inventory requirements | 40 | 50 | 60 | 70 | 80 |
| l. Cleans and maintains Central Sterilization | 40 | 50 | 60 | 70 | 80 |
| m. Maintains asepsis | 40 | 50 | 60 | 70 | 80 |
| n. Fabricates custom trays | 40 | 50 | 60 | 70 | 80 |
| o. Sharpens hand instruments | 40 | 50 | 60 | 70 | 80 |
| p. Switches compressors and lights | 40 | 50 | 60 | 70 | 80 |
| q. Shares cleaning responsibilities | 40 | 50 | 60 | 70 | 80 |
| r. Maintains professional demeanor | 40 | 50 | 60 | 70 | 80 |
| s. Assists at front desk | 40 | 50 | 60 | 70 | 80 |
| t. Works with orthodontist | 40 | 50 | 60 | 70 | 80 |
| u. Actively markets the practice | 40 | 50 | 60 | 70 | 80 |

Direction of Operations Assistant Position Description

Reports to: Owner

Summary

The director of operations is to promote and project the wishes and desires of the owners for practice growth, financial stability, and patient care. The director will review existing policies and procedures and related statistics to ensure they meet or exceed the required outcomes. The director will direct updates and modifications to the existing policies and procedures as needed.

Duties

The director will ensure that all federal state, local, and contractual obligations are satisfied. Remedies for compliance are to be provided and executed.

The director will have duties as required or needed from time to time, to include all functions of administrators/FDM/OM/CM.

The director shall promote and orchestrate a harmonious workplace environment between the clinical and administrative departments and shall provide the sole and server as the final adjudicator for any and all grievance (actual or applied).

The director's duties will be modified from time to time by mutual agreement or solely by the owner.

Employment Standards (to be added)

Agreements (to be checked/edited)

I have read the above statements and have had the opportunity to make revisions and have all questions answered to my satisfaction. I understand that the above statements are general guidelines and do not encompass all facets of my position. I, by signing below agree that these statements as listed provide for the baseline tenements for my position as a Hygienist at Dental Health Associates PA.

Employee Signature _____

Director of Operations Performance Appraisal

Rating Form

Employee _____ Rater _____ Date _____

Period of Appraisal _____

| Factors | Points | | | | |
|--|--------|----|----|----|----|
| 1) Professional Demeanor (dress, bearing) | 40 | 50 | 60 | 70 | 80 |
| 2) Punctuality (reports to work, leaves work) | 40 | 50 | 60 | 70 | 80 |
| 3) Patient Relations (pleasant, congenial, caring) | 40 | 50 | 60 | 70 | 80 |
| 4) Relations with Staff (cooperative, teamworker) | 40 | 50 | 60 | 70 | 80 |
| 5) Quantity of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 6) Quality of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 7) Supports goals of practice (collections, referrals) | 40 | 50 | 60 | 70 | 80 |
| 8) Position Skills (abilities) | 40 | 50 | 60 | 70 | 80 |
| 9) Position Responsibilities | 40 | 50 | 60 | 70 | 80 |
| a. Manages and monitors | 40 | 50 | 60 | 70 | 80 |
| b. Coordinates all treatment | 40 | 50 | 60 | 70 | 80 |
| c. Delivers general dentistry | 40 | 50 | 60 | 70 | 80 |
| d. Answers all requests from professionals | 40 | 50 | 60 | 70 | 80 |
| e. Markets the practice | 40 | 50 | 60 | 70 | 80 |
| f. Works with the owner | 40 | 50 | 60 | 70 | 80 |
| g. Supervises day sheets | 40 | 50 | 60 | 70 | 80 |
| h. Manages practice, staff, and associates | 40 | 50 | 60 | 70 | 80 |
| i. Develops, manages, monitors policies | 40 | 50 | 60 | 70 | 80 |
| j. Develops and conducts training | 40 | 50 | 60 | 70 | 80 |
| k. Supervises maintenance of motors | 40 | 50 | 60 | 70 | 80 |

Dental Hygienist Position Description

Reports to: Clinical Manager

Summary

Incumbent is licensed and experienced to provide

- Friendly and pleasant atmosphere to patients and associated staff
- A full range of dental hygiene and limited administrative procedures.
- Prepares and maintains own operatory and instruments.
- Maintains active responsibility for appointment scheduling and recall system.
- Performs other dental-related duties as may occasionally be required by partner(s).
- Supplemental documents for referenced guidelines and SOP are provided in the Office Manual

Duties

Operatory

- Maintains operatory cleanliness and orderliness
- Maintains clean/sterile conditions according to SOP
- Maintains operatory equipment , cleans and lubricates handpieces and suction equipment daily
- Maintains instruments in normal working condition. Sharpens own instruments
- Prepares operatory for procedures according to SOP
- Maintains operatory during procedures according to SOP.
- Cleans operators following procedures according to SOP
- Removes used instruments and materials according to SOP.

Chairside

- Review prior to appointment chart information for pertinent data.
- Greets, seats and bibs patient
- Reviews / discusses planned treatment according to SOP 'yorperio2'
- Updates medical history with signature annually
- Updates personal data (current address and telephone) as possible
- Contact Physicians as needed or directed
- Provides soft tissue examination and hard tissue charting.
- Delivers all legally prescribed and allowed periodontal care to patients.
- Checks and cleans removable appliances.
- Provides preventive instruction to patients as required, including brushing and flossing and limited nutritional counseling.
- Renders additional dental hygiene professional treatment beyond those cited whenever appropriate; e.g., curettage, fluoride treatments, sealants, Locally delivered chemotherapeutic agents (Arestin)
- Takes, develops and mounts necessary radiographs as directed or in accordance with SOP.
- Discusses oral conditions and concerns with patient and attending dentist.
- Enters data in patient chart including signature according to SOP.
- Takes patient from operatory to desk, gives completed file routing control form to receptionist
- Confirms next appointment type and time frame with receptionist.

Administrative

- Has primary responsibility to design, manage and implement the recall system, delegates appropriate duties to receptionist to implement.
- Active participant in maintenance of appointment scheduling that includes filling same day and next day hygiene schedule.
- Substitutes for receptionist recall duties during absences and peak work periods (app t. confirmation calls).
- Places requests for supplies, materials and equipment repair with office manager.
- Performs other dental-related duties as may occasionally be required or directed by partner(s).

Employment Standards

- Registered Dental Hygienist. Graduate of accredited Dental Hygiene education program.
- Minimum two years' experience as dental hygienist in active dental practice(s), including responsibility for recall system. Able to provide complete, high quality scaling and prophylaxis in 40 minutes.
- Attends C.E. course annually to develop clinical and managerial skills and to meet or exceed State Licensing requirements. Provide C.E. listing as taken or at annual performance review.

- Physically capable of performing dental hygiene duties to include sitting while delivering care, standing, stooping, bending, assisting patients in and out of dental chair and lifting items weighing up to 25 pounds.
- Emotionally capable of working effectively with varied patients, partners and associates, other staff members and under varying conditions of stress during high volume productivity periods; contributes to teamwork in practice.
- Professional demeanor, self-initiator, flexible provider of varying dental auxiliary services, personally neat and clean, well-developed social and interpersonal skills.
- Works under limited supervision as determined by law.
- Experienced in design and implementation of community education programs.

Agreements

I have read the above statements and have had the opportunity to make revisions and have all questions answered to my satisfaction. I understand that the above statements are general guidelines and do not encompass all facets of my position. I, by signing below agree that these statements as listed provide for the baseline tenements for my position as a Hygienist at Dental Health Associates PA.

Amendments (Full Time)

- The employee shall be employed under a part time work status. Whereas the agreed work schedule shall consist of a five day work unless mutually agreed.
- Compensation will be for \$(000.00) per day and prorated for any part of and will be paid in a bi weekly fashion in conjunction with existing office pay schedule and direct deposit.
- The employee will have access to medical benefits as charged to Dental Health Associates PA or provided reimbursement up to 75% of the amount paid by DHA for staff medical benefits. If employee selects reimbursement or declines medical benefits, they would be required to sign a statement that details this arrangement and accept the restrictions on reapplication of medical benefits as set by the third party administrator or medical insurance company.
- The employee will accrue paid time off that can be used at their discretion for sick, personal or vacation after 90 calendar days of employment at a rate of 0.40 days per calendar month (five days per calendar year).
- The employee will have five paid holiday starting after 90 calendar days of employment.
- The employee will have access to flexible spending benefits package as directed or restricted by the third party administrator AFLAC
- The employee will follow all associated policies of the office that are listed or implied in the DHA Office Manual or by Dr Wolcott from time to time. This is to include all restrictions under the benefit section for ' full time employee'

Amendments (Part Time)

- The employee shall be employed under a part time work status. Whereas the agreed work schedule shall consist of a one day work per week. Additional days from time to time, on mutual agreement
- Compensation will be for \$(000.00) per day and prorated for any part of and will be paid in a bi weekly fashion in conjunction with existing office pay schedule and direct deposit.
- The employee will follow all associated policies of the office that are listed or implied in the DHA Office Manual or by Dr Wolcott from time to time. This is to include all restrictions under the benefit section for ' part time employee'

Employee Signature _____

Dental Hygienist Performance Appraisal

Rating Form

Employee _____ Rater _____ Date _____

Period of Appraisal _____

| Factors | Points | | | | |
|--|--------|----|----|----|----|
| 1) Professional Demeanor (dress, bearing) | 40 | 50 | 60 | 70 | 80 |
| 2) Punctuality (reports to work, leaves work) | 40 | 50 | 60 | 70 | 80 |
| 3) Patient Relations (pleasant, congenial, caring) | 40 | 50 | 60 | 70 | 80 |
| 4) Relations with Staff (cooperative, teamworker) | 40 | 50 | 60 | 70 | 80 |
| 5) Quantity of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 6) Quality of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 7) Supports goals of practice (collections, referrals) | 40 | 50 | 60 | 70 | 80 |
| 8) Position Skills (abilities) | 40 | 50 | 60 | 70 | 80 |
| 9) Position Responsibilities | 40 | 50 | 60 | 70 | 80 |
| a. Prepares operatory | 40 | 50 | 60 | 70 | 80 |
| b. Cleans operatory | 40 | 50 | 60 | 70 | 80 |
| c. Maintains equipment and instruments | 40 | 50 | 60 | 70 | 80 |
| d. Greets patients | 40 | 50 | 60 | 70 | 80 |
| e. Takes/checks medical/dental history | 40 | 50 | 60 | 70 | 80 |
| f. Exposes develops, etc., X-rays | 40 | 50 | 60 | 70 | 80 |
| g. Coordinates treatment with dentist | 40 | 50 | 60 | 70 | 80 |
| h. Takes patient to the front desk | 40 | 50 | 60 | 70 | 80 |
| i. Provides home care instruction | 40 | 50 | 60 | 70 | 80 |
| j. Assists to maintain inventory | 40 | 50 | 60 | 70 | 80 |
| k. Uses "down time" appropriately | 40 | 50 | 60 | 70 | 80 |
| l. Actively markets the practice | 40 | 50 | 60 | 70 | 80 |

Detailed Duties

- Prepares operatory for treatment according to practice policy and state regulations. Places patient chart, tub, pre-set tray and lays out required extra instruments, supplies and medicaments to be used in treatment. Checks operatory for cleanliness. Checks daily schedule for patient appointment times. Checks charts for treatment required.
- Cleans operatory following treatment according to practice policies and state regulations. Places used instruments in ultrasonic and Central Sterilization does the rest.
- Maintains operatory equipment and instruments in normal working conditions. Sharpens own instruments, cleans and lubricates own handpieces. Cleans and maintains suction equipment according to usual office protocol. Restocks operatory supplies as stated in SOP Restocking.
- Greets patients in reception room, escorts to chair, seats and drapes patient. Engages patient in friendly conversation.
- Takes or checks medical/dental history for all patients and reviews history and chart information with current patients at each appointment.
- Provides soft tissue examinations including perio probing and hard tissue charting according to practice policy and procedures.
- Provides prophylaxis, fluoride treatment, scaling and root planing, takes impressions, pours models, and fabricates whitening trays
- Checks cleans removable appliances.
- Provides additional therapy or treatment when appropriate, i.e., fluoride treatments, sealants
- Discusses treatment fees and provide estimate as needed.
- Checks on status of prospective disease sites. Telephones physicians regarding patient's medical problems.
- Exposes, develops, mounts, checks for accuracy and reads full-mouth series, bite-wings, and periapical X-rays.
- Coordinates conclusion of treatment with availability of attending dentist. Prepares patient and chart and introduces patient to attending dentist. Discusses patient's oral condition with dentist; assists with examinations; enters complete and data about treatment needs in patient chart, signs and returns entire chart to receptionist.
- Completes routing control form.
- Takes patient from the operatory to the reception desk, gives chart and routing control form to receptionist, confirms next appointment with receptionist, dismisses patient and says "Goodbye."
- Provides preventive education to patients as necessary, including brushing, flossing, rubber tips, floss threaders, proxabrushes and the like. Use of disclosing solution and limited nutritional counseling.
- Assists with practice recall system: follows up continuously, updates recalls, monitors recall system, and recommends revisions whenever appropriate.
- Assists to maintain inventory of hygiene treatment and education requirements; places order with inventory control clerk
- Uses "down-time" appropriately. Telephones quick-call patients in attempt to fill cancelled appointments. Reviews charts for additional opportunities for treatment. Assists at reception desk to confirm treatment patients. Assists in lab; trims models. Assists dentists in operatory; takes alginate impressions. May assist with sterilization if needed.
- Actively markets the practice according to practice policy and procedures. Distributes business cards, discusses practice in social circles. Asks current patients to refer family and friends. Conducts "Happy Visits"; prepares operatory(ies) for child(ren) with non-threatening instruments to demonstrate treatment, explains treatment procedures and demonstrates "how things work." Gives gift to child(ren), takes child to parent/guardian to explain findings, behavior and requirements, for continued care. Provides balloons and prizes for all child patients.
- Prepares treatment room for treatment according to practice policies and OSHA regulations
- Checks daily schedule for patient appointment times and procedures scheduled
- Places patient's chart, instruments, supplies, and medicaments for treatment in treatment room
- Greets patients in reception room and escorts them to the treatment room
- Requests that patients rinse with Listerine for 30 seconds
- Seats and drapes the patient
- Engages patient in friendly conversation while opening sterilized instruments for final set-up
- Assures patient by informing them about planned procedures and the next step.
- Reviews impending treatment and/or any new or other dental problems from the last visit with patient
- Provides patient with forms to complete as needed
- Remains in operatory with patient as much as possible
- Introduces patient to treating dentist
- Engages in active compliance with all OSHA regulations regarding personal protective equipment and cross contamination techniques
- Assists the dentist at chairside by dental charting, visually and orally monitoring patient's general condition during treatment.
- Provides other supportive procedures as allowed by law to include oral hygiene instructions and demonstrations
- Reinforces recommended additional dental treatment as indicated with appropriate oral and printed materials

- Escorts the patient with the completed chart and routing control form to the front desk
- Provides any stickers, toys, and/or balloons to young patients
- Coordinated with the front desk regarding patient continuing care to include scheduling of recall appointments
- Gives any additional instructions to the receptionist and/or patient for next appointment or additional care
- Says good-bye to the patient and returns to the operator
- Cleans dental treatment room following treatment and at the end of the day according to practice policies and OSHA regulations
- Cleans, lubricates, and sterilized all re-usable dental equipment according to practice policies and OSHA regulations
- Disposes of all non-reusable and hazardous materials according to practice policies and OSHA regulations.
- Verifies and restocks all supplies and materials in treatment room and storage areas as needed according to practice policies and OSHA regulations
- Exposes, develops, and mounts prescribed radiographs as allowed by law and according to practice policies and OSHA regulations
- Assists in the maintenance of the dark room, central sterilization area, and laboratory area as needed according to practice policies and OSHA regulations
- Pours and trims dental study models according to practice policies and OSHA regulations
- Empties treatment room suction traps weekly
- During slow periods, helps other assistants and hygienists with seating patients, exposing radiographs, cleaning operatories, cleaning the lab and the darkroom, as well as front desk responsibilities as needed.

Associate Position Description

Reports to: Clinical Manager

Summary

Incumbent is licensed to practice dentistry. May have advanced training (or specialty). Has working knowledge of financial and personnel management and dental practice office systems. Formulates and presents complete treatment plans. Treats varied patients. Works with RDH to welcome patients and “check off” all services provided. Markets practice to increase patient population. Assumes other responsibilities to manage practice as may be delegated by Owner or Office Manager. Exhibits professionalism and leadership behavior consistent with commitment to the practice.

Duties

Clinical

- Diagnoses patients using accepted methods of examination, radiographs, study models and other diagnostic aids. Reviews medical history with each patient at each appointment, provides soft and hard tissue examination and charting. Enters all data and signs patient charts (writes legibly).
- Formulates and presents complete treatment plan to each patient consistent with practice policy. Responds to all questions about treatment and financial arrangements; revises plan consistent with patient requirements and practice policies.
- Delivers general dentistry to all patients, scheduled and referred, using Clinical Procedure Schedule for Doctors. Provides other dentistry and related services consistent with training or advanced training: e.g, oral surgery and endodontic services for all patients according to ability. Treats varied patient requirements with professionalism and the highest standards of care and competence consistent with practice policies and procedures. Makes follow-up calls to patients receiving “major” treatment: e.g, crowns & bridges, extractions, perio surgery, endodontics, etc.
- Welcomes and “checks off” all dental hygiene recall and first-time patients.
- Spends scheduled periods “on-call” during times office is closed, receives emergency telephone calls as directed by recorded message at office telephone number, responds to all legitimate emergencies by meeting patient(s) at office to diagnose and treat ailment, may give telephone advice and/or prescription to non-emergency patient.
- Completes specific time and procedures on routing control form that are to be performed during next treatment visit. Gives tooth number(s), surface(s), procedure(s), and total time(s) required for the appointment and receptionist use immediately following current appointment.
- Provides other dental –related services which may occasionally be required.

Administrative

- Markets practice and own capabilities in order to increase patient population. Develops professional methods to reach and attract patient from varied community populations and to retain current patients. May develop slide/tape presentations, short talks for civic and other groups, contributes to practice newsletter, announcements and brochures and other appropriate marketing methods.
- Works with Office Manager to develop and maintain or expand scheduling, bookkeeping, collections, inventory control and related systems. May complete day sheets, check deposit and give completed work to Office Manager at the end of each day. Assists with inventory control for all dental supplies and disposables. Periodically assists Office Manager with scheduling and collection matters and related systems.
- Supervises staff at direction of owner or Office Manager and during absence of either. Assists to recruit, interview, check references and hire staff. Periodically develops agenda and conducts regularly scheduled staff meetings. Trains and re-trains all staff in blood pressure screening and CPR techniques.

General

- Regularly checks all motors (compressors, suction, etc.) and reports servicing requirements for motors and dental equipment to Office Manager.

Employment Standards

- DDS or DMD from accredited Dental School. Advanced training (or specialty) in dentistry or field which increases experience and competence in delivering effective dental care.
- Trained and competent in blood pressure screening and certified in CPR. Capable of training staff to provide these services.
- Active member of component dental society or study club and Maryland State Dental Association. Belongs to ADA. Attends at least two C.E. courses annually to develop own clinical and management skills.

- Physically capable of performing duties as dentist including sitting while delivering care, standing, stooping, bending, assisting patients in and out of chair and lifting items weighing up to 40 pounds.
- Emotionally capable of working with varied patients, staff and other employees and other varying conditions of stress while remaining professional in direction and behavior.
- Leadership abilities, self-motivated, flexible, professional, committed to excellence in dentistry, efficiency of care delivery and effective management of the practice. Personally neat and clean, well-developed social and interpersonal skills.

Agreements (to be checked/edited)

I have read the above statements and have had the opportunity to make revisions and have all questions answered to my satisfaction. I understand that the above statements are general guidelines and do not encompass all facets of my position. I, by signing below agree that these statements as listed provide for the baseline tenements for my position as a Hygienist at Dental Health Associates PA.

Employee Signature _____

Associate Performance Appraisal

Rating Form

Employee _____ Rater _____ Date _____

Period of Appraisal _____

| Factors | Points | | | | |
|--|--------|----|----|----|----|
| 1) Professional Demeanor (dress, bearing) | 40 | 50 | 60 | 70 | 80 |
| 2) Punctuality (reports to work, leaves work) | 40 | 50 | 60 | 70 | 80 |
| 3) Patient Relations (pleasant, congenial, caring) | 40 | 50 | 60 | 70 | 80 |
| 4) Relations with Staff (cooperative, teamworker) | 40 | 50 | 60 | 70 | 80 |
| 5) Quantity of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 6) Quality of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 7) Supports goals of practice (collections, referrals) | 40 | 50 | 60 | 70 | 80 |
| 8) Position Skills (abilities) | 40 | 50 | 60 | 70 | 80 |
| 9) Position Responsibilities | 40 | 50 | 60 | 70 | 80 |
| a. Diagnoses Patients | 40 | 50 | 60 | 70 | 80 |
| b. Formulates and presents treatment plan | 40 | 50 | 60 | 70 | 80 |
| c. Delivers dentistry | 40 | 50 | 60 | 70 | 80 |
| d. Welcomes and "checks off" patients | 40 | 50 | 60 | 70 | 80 |
| e. "On Call" | 40 | 50 | 60 | 70 | 80 |
| f. Performs other dental related services | 40 | 50 | 60 | 70 | 80 |
| g. Markets the practice | 40 | 50 | 60 | 70 | 80 |
| h. Works with the Operations Manager | 40 | 50 | 60 | 70 | 80 |
| i. Supervises staff | 40 | 50 | 60 | 70 | 80 |
| j. Regularly checks motors | 40 | 50 | 60 | 70 | 80 |

Administrative Supervisor Position Description

Reports to:

Summary

This person is a major link between the practice and all patients, businesses and the general public. Therefore must command personal characteristics to be a professional, personable manager and exhibits leadership behavior consistent with commitment to practice. Manages and monitors all administrative activities, office book / record keeping, and clerical duties that are associated with practice management systems. Has working knowledge of financial and personnel management. Coordinates clinical activities or work schedules with dentist, hygienist, administration staff, assistants. Provide close supervision, resolves conflicts, provide recommendations, and conducts formal training for staff. To assist at making or adjusting patient appointments, making entries in patient records, accurately completing financial transactions, managing and verification of entries in computer and practice marketing related matters. Performs other administrative related duties as may occasionally be required.

Duties

Administration

- Delegates, verifies and modifies staff assignments and patient appointments as required
- Be held responsible for all assigned tasks to completion
- Recommends or modifies task assignments to dentist, hygienist, administration staff, clinical staff
- Informs dentist, hygienist, clinical staff, of clinical activities and modifications
- Manages operation of reception desk and activities of receptionist
- Joins or replaces staff in administrative activities as required by busy schedule or staff shortage
- Reviews schedules of patients, verifies financial restrictions and informs patient and provider accordingly
- Signing in and out personal time sheets, notes and informs on perceived problems relating to assigned hours
- Collects and checks time sheets biweekly and provides to owner
- Supervises completion of all day sheets, checks all deposits and gives completed work to owner at end of each day.
- Generates periodic financial reports including aging accounts receivable.
- Answers all request for copies of patient records from patients, attorneys, other dentist with owners review
- Uses computer to perform managerial and marketing functions daily or as required
- Conducts briefing twice weekly to coordinate clinical and administrative activities.
- Receives sorts, opens (when appropriate) and delivers mail
- Respond to questions regarding supply stock levels, supply ordering, supply disbursement
- Schedules and responds to all questions regarding urgent and routine office equipment maintenance
- Supervises or joins staff in (see SOP)

Financial

- Verifies that all assessed charges and collections are properly and accurately recorded all patients
- Receives and endorses payments by mail and accurately makes entries in computer and deposit slip
- Checks deposit slips against checks, cash, charges, confirms that all checks and credit card forms are prepared for deposit, transmits to owner or designee to deposit.
- Closes out day sheets. Checks and completes all Day sheets. Adds appropriate columns, deposits amounts and checks cash and charge slips, enters figures in trial balance section. rechecks all entries to balance figures
- Generates and mails monthly billing to all accounts receivable
- Tracks delinquent accounts to keep total accounts receivable to equivalent of two weeks productivity
- Respond to questions regarding dental benefit levels, dental benefit determinations, dental benefit disbursement
- Verifies all impending insurance documentation submitted and properly recorded
- Contacts dental benefit companies as needed
- Completes financial transactions, arrangements or contracts
- Supervises or joins staff in (see SOP)

Supervisory Duties

Administrative

- Responds to questions regarding task assignments, task requirements, and task management
- Ensures daily weekly and monthly assigned tasks are completed to accepted standards
- Ensure compliance of following all office policies and procedures and all Standard Operating Procedures
- Actively provide conflict resolution and recommendations for personal communication improvement
- Actively evaluates presents and promotes patient scheduling programs based on practice capabilities to increase patient satisfaction and practice efficiency

- Actively evaluates presents and promotes practice policies and procedures based on quality assurance
- Discusses and monitors receptionist contact with patients by phone and in person with regardsto daily schedule
- Actively participates in management meetings with review of past tasks and recommendations for future tasks
- Monitors, evaluates and makes recommendations based on practice tracking of patients and provides services (referrals, txpl presentations, treatment plan acceptance, treatment plan completion, financial arrangements, accounts outstanding, new patient letters, thank you for referral, general correspondence, general marketing information to include practice newsletter.)
- Actively evaluates presents and promotes internal and external practice marketing programs based on practice capabilities to increase patient population.
- Contributes to practice news letter
- Develops professional methods to reach and attract patients from varied community populations and retain current patients.
- Supports and keeps current mailing list or supplemental mailing list for ready use
- Presents or delegates presentation of treatment plan to all patients consistent with practice philosophy
- Assists with performance hiring, scheduled appraisals, discharge of staff
- Actively evaluates and recommends modifications for writing and placing employment advertisements
- Places and evaluates response from solicited advertisements
- Conduct initial interviews by phone and in person
- Recommends qualified candidates for consideration
- Completes all forms to hire staff or retain services of temporary auxiliaries.
- Uses performance appraisal form and appraisal sessions to consul coach and improve performance
- Appraises staff performance of each staff member twice a year according to practice policy and procedures
- Trains, retrain and upgrades current staff in all office practice policies and procedures
- Organizes and run staff meetings for administrative staff on three time a year basis collection
- May assist occasionally chairside if required
- Organize and trains staff in all office equipment
- Always maintains professional demeanor and confidentiality of patient information and interaction

Financial

- Supervises business staff with scheduling and collection matters related systems and files all claims for dental benefits

Employment Standards (to be added)

Agreements (to be checked/edited)

I have read the above statements and have had the opportunity to make revisions and have all questions answered to my satisfaction. I understand that the above statements are general guidelines and do not encompass all facets of my position. I, by signing below agree that these statements as listed provide for the baseline tenements for my position as a Hygienist at Dental Health Associates PA.

Employee Signature_____

Administrative Supervisor Performance Appraisal (to be added)

Rating Form

Employee _____ Rater _____ Date _____

Period of Appraisal _____

| Factors | Points | | | | |
|--|--------|----|----|----|----|
| 1) Professional Demeanor (dress, bearing) | 40 | 50 | 60 | 70 | 80 |
| 2) Punctuality (reports to work, leaves work) | 40 | 50 | 60 | 70 | 80 |
| 3) Patient Relations (pleasant, congenial, caring) | 40 | 50 | 60 | 70 | 80 |
| 4) Relations with Staff (cooperative, teamworker) | 40 | 50 | 60 | 70 | 80 |
| 5) Quantity of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 6) Quality of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 7) Supports goals of practice (collections, referrals) | 40 | 50 | 60 | 70 | 80 |
| 8) Position Skills (abilities) | 40 | 50 | 60 | 70 | 80 |
| 9) Position Responsibilities | 40 | 50 | 60 | 70 | 80 |
| a. Task 1 | 40 | 50 | 60 | 70 | 80 |

Clinical Supervisor Position Description

Reports to:

Summary

- Coordinates clinical activities with dentist, hygienist, administration staff, assistants, maintenance workers and laboratory work. Provide close supervision, resolves conflicts, provide recommendations, and conducts formal training for staff.
- Assists at chairside with Dentist or Hygienist and in laboratory.
- Prepares operatory and patient, exposes and develops radiographs, prepares various materials and medicaments, manages impressions for laboratory procedures.
- Uses autoclave and other appliances, orders and receives practice supplies.
- Performs other dental related duties as may occasionally be required

Duties

Office

- Assures water, compressors, suction pumps, autoclaves, automatic developer are turned on and off daily
- Reviews schedules of patients, verifies collected charts and distributes accordingly
- Obtains charts and routing control forms as needed
- Logs in all returned laboratory cases
- Verifies all impending laboratory work is returned and collected for that days patients
- Contacts laboratory as needed
- Verifies and modifies clinical staff assignments and patient appointments as required
- Recommends or modifies task assignments to dentist, hygienist, administration staff, assistants
- Informs dentist, hygienist, administration staff, assistants of clinical activities and modifications
- Supervises or joins staff in Instrument Management (see SOP) from previous day
- Supervises or joins staff in Initial Operatory Preparation (see SOP)

Supervisory responsibility

- Responds to questions regarding task assignments, task requirements, and task management
- Joins or replaces staff in clinical activities as required by busy schedule or staff shortage
- Be held responsible for all assigned tasks to completion
- Respond to questions regarding supply stock levels, supply ordering, supply disbursement
- Schedules and responds to all questions regarding urgent and routine office equipment maintenance
- Ensure compliance of following all office policies and procedures and all Standard Operating Procedures
- Ensures daily weekly and monthly assigned tasks are completed to accepted standards
- Signing in and out personal time sheets, notes and informs on perceived problems relating to assigned hours
- Actively participates in management meetings with review of past tasks and recommendations for future tasks
- Actively provide conflict resolution and recommendations for personal communication improvement
- Organizes and run staff meetings for Clinical Assistants on Bi-monthly basis
- Organize and trains staff in policies and procedures
- Organize and trains staff in all maintenance of dental equipment

Personal Performance Goals

- Research, propose, write, and initiate a volunteer project for the most needed patients
- 5 formal clinical Assistant meeting, with at least one being formal hands on training
- Notify individuals that restrict or hinder duties and responsibilities of supervisor
- Monitor and manage all activities of job performance of immediate staff in PPE review 2 times yearly
- Maintain list of observations and recommendations for review in quarterly PPE review as supervisor
- Command personal characteristics to be a professional, personable behavior consistent with commitment to practice at all times
- Inform and recommend supervisory meetings to manage urgent matters.

Employment Standards (to be added)

Agreements (to be checked/edited)

I have read the above statements and have had the opportunity to make revisions and have all questions answered to my satisfaction. I understand that the above statements are general guidelines and do not encompass all facets of my position. I, by signing below agree that these statements as listed provide for the baseline tenements for my position as a Hygienist at Dental Health Associates PA.

Employee Signature _____

Clinical Supervisor Performance Appraisal (to be added)

Rating Form

Employee _____ Rater _____ Date _____

Period of Appraisal _____

| Factors | Points | | | | |
|--|--------|----|----|----|----|
| 1) Professional Demeanor (dress, bearing) | 40 | 50 | 60 | 70 | 80 |
| 2) Punctuality (reports to work, leaves work) | 40 | 50 | 60 | 70 | 80 |
| 3) Patient Relations (pleasant, congenial, caring) | 40 | 50 | 60 | 70 | 80 |
| 4) Relations with Staff (cooperative, teamworker) | 40 | 50 | 60 | 70 | 80 |
| 5) Quantity of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 6) Quality of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 7) Supports goals of practice (collections, referrals) | 40 | 50 | 60 | 70 | 80 |
| 8) Position Skills (abilities) | 40 | 50 | 60 | 70 | 80 |
| 9) Position Responsibilities | 40 | 50 | 60 | 70 | 80 |
| a. Task 1 | 40 | 50 | 60 | 70 | 80 |

Office Manager Position Description

Reports to:

Summary

Incumbent has working knowledge of financial and personnel management and dental practice office systems. Manages and monitors all administrative and clinical activities of the practice. Exhibits leadership behavior consistent with commitment to the practice. This person is the major link between the owner, the clinical and receptionist staff, all patients and the general public. Duties include supervising activities of the front desk, completing financial transactions, practice marketing, and other practice-related matters. Coordinates clinical activities with the dentists, hygienists, and the reception desk.

Duties

- Manages and monitors all administrative and clinical activities of the practice; delegates appropriate tasks to business staff, clinical staff, hygienists, and associates consistent with position descriptions. Coordinates the scheduling of all treatment rendered in the practice. Reviews the records of all patients referred to the practice. Reviews numbers of referrals out of practice to specialists.
- Actively markets the practice and capabilities of associates and staff in order to increase the patient population. Develops professional methods to reach and attract patients from varied community populations and to retain current patients. Contributes to the practice newsletter.
- Works with the owner to monitor effectiveness of improvements to scheduling, bookkeeping, collections, inventory control, and other practice policies and procedures.
- Supervises completion of all day sheets and checks all deposits.
- Manages administrative functioning of practice and activities of staff and associates. Assists owner to recruit, interview, check references, and hire staff. Solicits opinion and help from staff. Counsels regularly with staff about job performance. Develops agenda for and conducts regularly scheduled (monthly) staff meetings.
- Develops, manages, and monitors practice policies and procedures for quality assurance and asepsis control.
- Closes out day sheets. Checks and completes all day sheets. Adds appropriate columns.
- Answers all requests for copies of patient charts from patients, attorneys, other dentists, and other professionals.
- Uses computer to perform managerial and marketing functions daily or as required. Generates periodic financial reports including aging Accounts Receivable.
- Approves all orders for dental supplies.
- Performs limited, general administrative work. May run local errands to the bank, supermarket, retail stores, and post office. Always maintains professional demeanor and confidentiality of patient information and interaction.

Detailed Duties

Statistics/Lists

On a daily basis the OM should be aware of the status of various areas of production. Knowing where the current statistics can be found or having a program status updated would be workable.

- New Patients
- Production
- Collections
- A/R's. (Monitored weekly)
- Bills List (Accts Payable monitored weekly)
- Any current written programs (ie marketing, OM program, hiring, bonuses, etc)
- Recall (ie, phone calls made, recall cards out, etc.)
- Staff vacations/time off/etc.
- Other: _____

Delegation

As a Manager, various aspects of the office need proper assignment of responsibility. This is vital to ensure the Office Manager is not mired in doing the tasks which she should be monitoring.

- Appointment Coordinator
- Financial Coordinator
- Maintaining various statistics logs can be assigned to others.
- Recall
- Other: _____

Management/Coordination

As the Office Manager, various management activities are needed:

- Morning coordinator meetings.
- Daily, Weekly, Monthly production targeting for the Front Office staff.
- Production and statistical assignment for the Front Office staff.
- Front Office organization.
- "1 on 1" meetings with the Front Office staff.
- Other: _____

Monthly Duties

- Bill payments by 15th of the month.
- Updating monthly charts by the first week of every month
- Daily Deposits (To the bank and logged in Peachtree)
- Monthly ordering of supplies as needed both clinical and dental.
- Weekly directors meeting
- Monthly staff meetings
- New hire protocols and paperwork

Employment Standards (to be added)

Agreements (to be checked/edited)

I have read the above statements and have had the opportunity to make revisions and have all questions answered to my satisfaction. I understand that the above statements are general guidelines and do not encompass all facets of my position. I, by signing below agree that these statements as listed provide for the baseline tenements for my position as a Hygienist at Dental Health Associates PA.

Employee Signature _____

Office Manager Performance Appraisal

Rating Form

Employee _____ Rater _____ Date _____

Period of Appraisal _____

| Factors | Points | | | | |
|--|--------|----|----|----|----|
| 1) Professional Demeanor (dress, bearing) | 40 | 50 | 60 | 70 | 80 |
| 2) Punctuality (reports to work, leaves work) | 40 | 50 | 60 | 70 | 80 |
| 3) Patient Relations (pleasant, congenial, caring) | 40 | 50 | 60 | 70 | 80 |
| 4) Relations with Staff (cooperative, teamworker) | 40 | 50 | 60 | 70 | 80 |
| 5) Quantity of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 6) Quality of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 7) Supports goals of practice (collections, referrals) | 40 | 50 | 60 | 70 | 80 |
| 8) Position Skills (abilities) | 40 | 50 | 60 | 70 | 80 |
| 9) Position Responsibilities | 40 | 50 | 60 | 70 | 80 |
| a. Manages front desk and receptionists | 40 | 50 | 60 | 70 | 80 |
| b. Uses computer | 40 | 50 | 60 | 70 | 80 |
| c. Bills patients | 40 | 50 | 60 | 70 | 80 |
| d. Receives payments by mail | 40 | 50 | 60 | 70 | 80 |
| e. Receives insurance payments by mail | 40 | 50 | 60 | 70 | 80 |
| f. Orders clerical supplies | 40 | 50 | 60 | 70 | 80 |
| g. Assists with personnel staffing | 40 | 50 | 60 | 70 | 80 |
| h. Actively markets the practice | 40 | 50 | 60 | 70 | 80 |

Patient Benefit Coordinator Position Description

Reports to:

Summary

The Patient Benefit Coordinator (Coordinator) focus is to ensure that every patient that is seen in the office has been given every opportunity to understand recommended treatment, their fiduciary responsibility to include third party (insurance) benefits, the coordination of these benefits with other insurance benefits and the options and means to obtain all recommended treatments.

The Patient Benefit Coordinator is a full time administrative position responsible for leading and directing insurance claims operations of the practice, that includes but not limited to the responsibility for managing the accurate and timely submission, tracking, collection of such payments, reporting and analysis of both insurance claims and patient billing for care provided. To assure that insurer guidelines regarding payment for treatment are coordinated with concern for the each patient's appropriate dental care.

Duties

The Coordinator will be responsible for leading and directing financial agreements for patient co-payments, they include but not limited to the responsibility for managing internal payment plans and or third party 'outside' payment plans.

The Coordinator to arrange and oversee manages the credentialing or re-credentialing process for all of employees as required by our insurance payers.

Coordinator will work with clinical and front desk staff to expand knowledge about insurer policies and payment for problem areas and assure that practice policies are followed at the front desk, that coordination among clinical and administrative staff is improved, and that insurance payments are legally maximized.

Coordinator will train and update front desk administrative staff on provider policies and systems operations specific to insurance coverage and billing parameters.

Other responsibilities include management of the treatment planning function, submission of predeterminations and preauthorization request, and in order to distinguish the practice from others who accept insurance, educating patients about the mechanics of their dental insurance plan and coverage. This scope of responsibility will allow Coordinator to be an active link between patients and providers when patients require major dental service.

While there may be times when assistance is needed to schedule appointments and answer phones, the nature of Coordinator duties requires significant dedicated work time. However, the coordinator will provide 'back up' to the front desk administrators as needed from time to time or as directed by the immediate supervisor or Dr Wolcott. If it is found that these back up duties are impairing the performance of the Coordinator, a review may be requested to rectify.

Below is an overview of items that would be anticipated deliverables from the Coordinator.

- 1) Training: Leas the training of front desk employees on everyday administrative tasks that deal directly with insurance and billing. Including, but not limited, to how to answer patient inquiries such as what types of insurance we accept, the meaning of balance billing, how to properly create treatment plans and when to request predeterminations and pre-authorizations.
- 2) Reports/Tracking Insurance Profiles: Provide my direct supervisor with pertinent insurance information daily, weekly, and or monthly as agreed.
 - Total outstanding claims
 - Total monies out in claims
 - Separated in cycles (16-30, 31-45, 46,60 etc)
 - % of claims out per cycle via total monies summary
 - Analysis of % vs. previous month, rolling quarter, previous fiscal quarter, same month last year
 - Average per claim
 - Analysis of insurer payment
 - General overview of insurance and A/R standing

- By Insurance statistics tracking to include average claim payment time from claim submission to payment. Analysis of insurer via 54/90 report.
 - Analysis of prospective insurer companies for addition or rejection to our panel list
 - Updates on listing of insurer participation and fee schedules for both general and specialist.
 - Implementation of system to ensure dental software is continuously tested and assessed for accuracy in the office master fee schedule and insurance fee schedules.
- Letter generation and tracking
 - i. 30 day letters
 - ii. 45 day letters
 - iii. 60 day letters
 - iv. Final notice letters
 - v. Settlement letters
- 3) Predetermination/Preauthorization Requests: All necessary treatment outside of basic restorative treatment that totals more than \$500.00 should be preceded with a mandatory call for an insurance predetermination. i.e., Onlays, crowns and multiple extractions. All necessary treatment that totals \$1,000.00 or more should be preceded with preauthorization request prior to treatment. i.e., Periodontal surgeries, implants and multiple crowns and onlays. This will reduce the amount of denials and allow payment options to be explored and finalized prior to treatment. These predeterminations and preauthorizations should be treated as priority and insurer response should be forwarded to patient along with an accurate treatment letter. Each letter should then be followed with a call to schedule or confirm an appointment for treatment.
 - 4) Treatment Planning: The Coordinator will lead to generate or have generated complete treatment plans and treatment plan letters that have been reviewed, approved, and signed by the attending dentist. Treatment plan letters that will / may require predeterminations should also be added to this list of duties. As any questions or concerns dealing with benefits and payment options would be best explained by the Patient Benefit Coordinator. Many patients will question the terms of the pre-estimate explanation of benefits. In a perfect world patients would be completely aware of all of their benefits and the terminology used by providers and insurers.
 - 5) Insurer Payment Tracking: Manage the insurer bounce rate. This bounce rate is defined as any reason any claim did not get paid in compliance within the patients defined benefit in the first submittal. This would include rejection from and third party claims company, traditional request for more information, claim denials or the like and remedy. This would also include a similar reporting for each subsequent submittal. This report will due weekly.
 - 6) Specialists: Manage specialist accounts. Lead consultations. Work in conjunction with the specialist assistant to create appropriate treatment planning and financial arrangements and collections

Below is a list of anticipated deliverables from the employer, Dental Health Associates PA.,

- 7) Personal Training: To include the following training avenues:
 - CareCredit
 - PerioVision
 - Shadowing of Clinical staff
 - Seminars/courses dedicated to dental insurance and billing
- 8) Compensation
 - \$20.00 per hour
 - 10 days/80 hours of Paid Time Off (Personal Time Off) which includes vacation, sick and family leave (excluding holidays)
 - as defined in the employee benefit manual
 - Written schedule of office paid holidays
 - Full time medical, and dental benefits
 - Profit sharing
 - Consistent 6 month reviews

- 12 consecutive months from date of this signed agreement and every 12 months thereafter a review and consideration for compensation enhancement that can include an incentive pay program.

While it may be understood that there are existing policies and procedures on various aspects of these listed and other items, the Coordinator will seek and locate, amend, update or make a new each of these policies with the direction and approval of the Coordinators immediate supervisor and Dr Wolcott. Once approved, these policies and procedures will be maintained in a fashion to be available to the staff at all times. And this agreement provides a general outline of tasks and responsibilities and is not understood to be a limiting outline of responsibilities

The signatures below certify that both parties involved agree with the aforementioned terms and compensation effective on the date signed below. Employment Standards (to be added)

Employment Standards (to be added)

Agreements (to be checked/edited)

I have read the above statements and have had the opportunity to make revisions and have all questions answered to my satisfaction. I understand that the above statements are general guidelines and do not encompass all facets of my position. I, by signing below agree that these statements as listed provide for the baseline tenements for my position as a Hygienist at Dental Health Associates PA.

Employee Signature_____

Patient Benefit Coordinator Performance Appraisal (to be added)

Rating Form

Employee _____ Rater _____ Date _____

Period of Appraisal _____

| Factors | Points | | | | |
|---|--------|----|----|----|----|
| 1) Professional Demeanor (dress, bearing) | 40 | 50 | 60 | 70 | 80 |
| 2) Punctuality (reports to work, leaves work) | 40 | 50 | 60 | 70 | 80 |
| 3) Patient Relations (pleasant, congenial, caring) | 40 | 50 | 60 | 70 | 80 |
| 4) Relations with other Staff (cooperative, teamworker) | 40 | 50 | 60 | 70 | 80 |
| 5) Quantity of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 6) Quality of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 7) Supports goals of the Practice (collections) | 40 | 50 | 60 | 70 | 80 |
| 8) Position Skills (abilities) | 40 | 50 | 60 | 70 | 80 |
| 9) Position Responsibilities | 40 | 50 | 60 | 70 | 80 |
| | | | | | |
| a. Task 1 | 40 | 50 | 60 | 70 | 80 |

Additional Patient Benefit Coordinator Job Descriptions (to be added)

Additional Job 1

Purpose:

Basic duties:

Self Performance Appraisal

Rating Form

Name _____ Position _____ Date _____

Period of Appraisal _____

Superior Needs polish Average Need attention Poor

1) Patient Relations

- a. Pleasant -----
- b. Congenial -----
- c. Caring -----
- d. Assistive -----
- e. Greeting Patient -----
- f. Maintains Patient Record -----
- g. Enters Record Notes -----
- h. Reviews / Appts Next Tx. -----
- i. Reviews Last Tx. -----
- j. Tx Explanations -----

2) Work Ethics

- a. Quality -----
- b. Efficiency -----
- c. Responsible -----

3) Professional

- a. Clothing -----
- b. Hair / Makeup -----
- c. Vocabulary -----
- d. Attitude -----

4) Staff Relations

- a. Pleasant -----
- b. Congenial -----
- c. Cooperative -----
- d. Team worker -----

5) Assistive

- a. Front Desk -----
- b. Assistant -----
- c. Hygienist -----
- d. Doctors -----

6) Punctuality

- a. Reporting for work -----
- b. Lunch Hour -----

7) Abilities

- a. Workspace -----
- b. Cleans Organize Workspace -----
- c. Uncluttered Workspace -----
- d. Maintains Equipment -----
- e. Use of Down Time -----
- f. Self Directed -----
- g. Promotes Timely Care -----
- h. Promotes New Patients -----

Use other side for personal comments.

New Sections for Possible Placement or Removal

Lab Case Manager

It is policy that the duties and functions of the lab case manager are to be completed on a daily basis.

Responsibilities include:

- Making sure lab forms are filled out properly.
- Cases are packaged correctly and shipped.
- Maintaining a lab case log that is filled out daily.
- Ensure that all lab cases are returned on their scheduled returned date.
- Confirm all lab cases are present 24 hours before patients' appointment.
- Re-confirm all lab cases are present and pulled right before patients' appointment

There are NO exceptions to this policy.

Dental Assistant Supervisor Performance Appraisal

Rating Form

Employee _____ Rater _____ Date _____

Period of Appraisal _____

| Factors | Points | | | | |
|--|--------|----|----|----|----|
| 1) Professional Demeanor (dress, bearing) | 40 | 50 | 60 | 70 | 80 |
| 2) Punctuality (reports to work, leaves work) | 40 | 50 | 60 | 70 | 80 |
| 3) Patient Relations (pleasant, congenial, caring) | 40 | 50 | 60 | 70 | 80 |
| 4) Relations with Staff (cooperative, teamworker) | 40 | 50 | 60 | 70 | 80 |
| 5) Quantity of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 6) Quality of Work (consistency) | 40 | 50 | 60 | 70 | 80 |
| 7) Supports goals of practice (collections, referrals) | 40 | 50 | 60 | 70 | 80 |
| 8) Position Skills (abilities) | 40 | 50 | 60 | 70 | 80 |
| 9) Position Responsibilities | 40 | 50 | 60 | 70 | 80 |
| a. Opens office | 40 | 50 | 60 | 70 | 80 |
| b. Meets with staff | 40 | 50 | 60 | 70 | 80 |
| c. Prepares operatory | 40 | 50 | 60 | 70 | 80 |
| d. Greets patients | 40 | 50 | 60 | 70 | 80 |
| e. Assists dentist at chairside | 40 | 50 | 60 | 70 | 80 |
| f. Takes impressions | 40 | 50 | 60 | 70 | 80 |
| g. Exposes, develops, mounts X-rays | 40 | 50 | 60 | 70 | 80 |
| h. Writes entries in patient chart | 40 | 50 | 60 | 70 | 80 |
| i. Cleans operatory | 40 | 50 | 60 | 70 | 80 |
| j. Loads and unloads driclave/autoclave | 40 | 50 | 60 | 70 | 80 |
| k. Lubricates handpieces | 40 | 50 | 60 | 70 | 80 |
| l. Schedules laboratory cases | 40 | 50 | 60 | 70 | 80 |
| m. Supervises ordering dental supplies | 40 | 50 | 60 | 70 | 80 |
| n. Maintains asepsis | 40 | 50 | 60 | 70 | 80 |
| o. Supervises order in Central Sterilization | 40 | 50 | 60 | 70 | 80 |
| p. Supervises staff | 40 | 50 | 60 | 70 | 80 |
| q. Performs limited administrative work | 40 | 50 | 60 | 70 | 80 |
| r. Supports Periodontist | 40 | 50 | 60 | 70 | 80 |
| s. Closes office | 40 | 50 | 60 | 70 | 80 |
| t. Always maintains professional demeanor | 40 | 50 | 60 | 70 | 80 |
| u. Actively markets the practice | 40 | 50 | 60 | 70 | 80 |

Telemercials

Template and Script for Telemercials

To:
From: ExecTech, Jim Emmick

April 14, 2004

We have had quite a bit of success with hiring Atelemercials@. With them, you can present your practice with a complete description of the employee you are looking for. If the prospective employee is interested, they can leave pertinent information. Remember to listen to their message and grade their phone presentation on a scale of 1-10.

Read this script over and edit as needed to make your own. Also, there are several variations at the close of the message. You can ask them to call the office, send in resumes, or even explain how the position is of interest. I think the offer below is fine, but do what you believe will be most effective.

Sample Script: (Be yourself and be upbeat with your script presentation. I edited a previously used successful script and made it fit your practice situation. You should edit it and make it something you feel correctly represents your offer and your practice. I wanted you to get a feel of how the script *can* work.)

Hi! Thanks for calling the office of Dr. _____ (or place practice name) to inquire about our Appointment Coordinator position.

It is difficult to properly portray our job offer in just a few lines in a classified ad, so please allow us to give you some information over the phone. This way you can better decide if this opportunity is for you.

We are a private medical practice specializing in allergies located in Montgomery Village, Maryland. Our purpose is to provide the best allergy care possible in a caring and professional environment.

We are seeking an energetic, professional, reliable and people-oriented individual to compliment our team as the Appointment Coordinator. We can train, but we do prefer some medical front office experience. The overall goal of the Appointment Coordinator is to provide for all patient scheduling in a friendly and caring way. In doing so the Appointment Coordinator is the first that represents the office to the patients and referring doctors. A view of the Appointment Coordinator duties are: scheduling, appointment confirmation, patient reactivation, data entry, and We offer excellent pay based on experience. We also have great benefits including paid holidays, paid vacation, and bonus programs. We are a progressive and modern allergy practice and our professionalism is seen in the way we treat our patients and in how we treat our staff.

This is a part-time position- (note the days and hours). We are open five days a week Monday thru Friday from 9 to 5. If this sounds like something you may be interested in pursuing, please leave a confidential message on this recorder. Along with your name, phone, and best times to call you, please tell us what interests you in the job opening. We will get back to you as soon as possible. Thank you.@

Front Desk Manager

Hello, Thanks for calling Dental Health Associates to inquire about our **front desk manager** position.

It is difficult to properly portray our job offer in just a few lines in a classified ad, so please allow us to give you some information over the phone. This way you can better decide if this opportunity is for you.

We are a private Dental practice specializing in state of the art dentistry just off the beltway in Silver Spring, Maryland. Our purpose is to provide the best Dental possible in a caring and professional environment.

We are seeking an energetic, professional, reliable and people-oriented individual to compliment our team as a front desk manager. We can train, but we would prefer some medical or dental front office experience.

The overall goal of the front desk manager is to provide patient scheduling and financial coordination in a friendly and caring way. In doing so the **front desk manager** will be the point person that represents the office to virtually every patient. Views of the **front desk manager's** duties are: collection of patient co-payment & outstanding balances, appointment scheduling, appointment confirmation, patient reactivation, data entry and project design management.

We are a progressive and modern dental practice and our professionalism is seen in the way we treat our patients and in how we treat our staff. As this is a full time position, we offer excellent pay based on experience and the ability to manage & complete responsibilities of assigned special projects and tasks. We also have great benefit packages including paid holidays, paid vacation, flexible medical savings and health care insurance.

Your anticipated work schedule will be Mon thru Fri from 8 to 5. There are no weekend hours. If this sound like something you may be interested in pursuing, please leave a confidential message on this recorder. Along with your name, phone and best times to call you, please tell us what interests you in the job opening. We will be back to you as soon as possible. Thank you.

Bookkeeper

Hello, Thanks for calling Dental Health Associates to inquire about our **front desk Bookkeeper/receptionist** position.

It is difficult to properly portray our job offer in just a few lines in a classified ad, so please allow us to give you some information over the phone. This way you can better decide if this opportunity is for you.

We are a private Dental practice specializing in state of the art dentistry just off the beltway in Silver Spring, Maryland. Our purpose is to provide the best Dentistry possible in a caring and professional environment.

We are seeking an energetic, professional, reliable and people-oriented individual to compliment our team. Medical or dental front office experience preferred but we can train if you bring other strong qualities with you.

The **front desk bookkeeper** will be the point person that represents the office to virtually every patient. The overall goal is to provide patient scheduling and financial coordination in a friendly and caring way. Some of the specific responsibilities are: collection of patients' active & outstanding balances, appointment scheduling, patient reactivation, data entry and basic filing. Computer skills are a must and being Bi-lingual is a major plus.

We are a progressive and modern dental practice and our professionalism is seen in the way we treat our patients and in how we treat our staff. As this is a full time position, we offer excellent pay based on experience and the ability to manage & complete responsibilities of assigned tasks and special projects. We also have great benefit packages including paid holidays, paid vacation, flexible medical savings and fully paid health care insurance.

Anticipated work schedule will be Mon thru Fri from 8 to 5 with no weekend hours. If this sound like something you may be interested in pursuing, please leave a detailed and confidential message after the beep. This message can be as long as you need to convey your interest and skills you possess that would make you the number ONE candidate for this position.

Please remember to include your name, phone number and best times to call you. We will call back all candidates that meet our expectations usually within 3 business days.

Thank you.