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## 7 Key Elements of Front Office Orientation

by *Becky Gerber*

Training a new front office employee presents challenges, especially when the selected candidate might lack specific dental experience. However, prioritizing attributes like dynamism, a strong work ethic, and exceptional customer service skills can make them an excellent fit for the role. Even if the employee possesses knowledge of the position and practice management software, their acclimation to your practice's policies and procedures is vital.

### Tour and HR Necessities

# 1

Upon hiring the ideal candidate, initiate onboarding with a comprehensive office tour. Introduce them to the team, outlining each member's role and responsibilities. Ensure compliance with all necessary human resource paperwork mandated by state and federal laws. Foster inclusion and teamwork by involving staff in meetings, huddles, and team-building activities.

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## Documentation and Systems

# 2

Subsequently, familiarize the new employee with the front office equipment and the accessible location of standard operating procedure guides. Include the location of manuals for training, emergency procedures, HIPAA, OSHA, and any human resources material. Where are the digital copies? Where are the physical copies? Offer a detailed overview of computerized systems and their integration with practice management software and other front office systems.

## Practice Culture

# 3

Next, immerse the new hire in the practice's culture. Familiarize them with the website, pertinent social media, doctor profiles, associates, their backgrounds, services provided, external referral sources, and operating hours. A tour of treatment rooms, explaining the procedures conducted in each, helps visualize patient flow during appointment scheduling.



## Practice Services

# 4

Detail the top 10 or 20 daily services performed, providing comprehensive information and utilizing resources like procedure buttons in the practice management software or relevant online videos. Additionally, aid the employee in creating relatable word pictures to communicate procedures to patients effectively.

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## General Customer Service Skills



Commence front desk training by guiding the new employee in meeting, greeting, and positively handling phones. Focus on imparting customer service skills and fostering effective communication with the clinical team, emphasizing the importance of being the office's welcoming face and initial impression.

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## Phone Scripts



Offer simple phone scripts for various scenarios such as emergencies, new patients, returning patients, delays, and the cancellation policy. Emphasize the significance of conveying a positive attitude, using appropriate professional jargon, and understanding patients' varying technology preferences.

*What They Say about Trojan*

*Lynn, Office Manager*

"Adriana was very helpful, patient, and professional. I can honestly say that I have been using Trojan for over 12 years, and all of your techs know the system and can give me answers. We are very satisfied".

(CONTINUED ON PAGE 4)

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**Christine Taxin  
Debbie Seidel-Bittke  
Bent Eriksen**



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# Appointment Practices

# 7

Discuss appointment book rules and goals, showcasing the rationale behind appointment blocks and timing for specific procedures. Encourage exposure to dental terminology through repetition, facilitating easy recognition of daily procedures.

In an ideal situation, allow new employees time to absorb information within a day or two of orientation. Shadowing experienced team members serves as a valuable training method. Prioritize the Platinum Rule: have patience, treat others with respect, and acknowledge each employee's uniqueness and individual needs.

Becky Gerber has been a leader in the dental consulting community for more than 4 decades. In 2006, she started the Academy of Dental Practice Careers, a training institute for dental front office professionals. In 2013, the insurance courses were launched online to reach students nationwide. Recently, Portland, Oregon, has become the new site for the corporate office of the ADPC.

Through the years, Becky has collaborated and worked with some of the biggest consulting names in dentistry.

FMI: <https://www.dentalpracticecareers.com>



Read more from Becky Gerber:

[Trojan Today: "Ride the Wave: Utilize Remote Services" by Becky Gerber - Trojan Professional Services \(trojanonline.com\)](#)

## Check These Out:

Christine Taxin:

[Reference Guides Archives – Dental Medical Billing.](#)

[Insurance Extravaganza 2024: THE Dental Revenue Cycle Conference – Dental Medical Billing.](#)

Academy of Dental Practice Careers online courses including:

<https://www.dentalpracticecareers.com/dental-insurance>

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# Ask the Consultant

Answer by Katheleen Johnson

**Q:**

If a Patient has Delta Dental as a primary and we are a premier provider and have out-of-network insurance for a secondary, can we charge the secondary the UCR fee and adjust the fee accordingly when billing the secondary?

**A:**

The ADA recommends that dentists always submit their full fees to all insurance companies. As far as what fees can be charged, that can be attributed to many factors. For example, some payers may allow dentists to charge up to the higher allowable fees while others will only allow up to the lower of the allowable fees. The secondary payer's EOB should indicate the correct patient responsibility. However, some secondary payers may not include a patient responsibility column on their EOB statement, while others may not include a correct patient responsibility.



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