

# HOW TO EDIT YOUR MANUALS

As you might imagine, creating these manuals was quite an undertaking. We knew that no single manual would apply to every practice, since each doctor has a unique personality and management style. Over the years, we updated the manuals with both ideas from our clients and emerging techniques.

The resulting contents provide detailed policies and procedures that will significantly reduce your administrative efforts. You may choose to leave the contents in the original form or to adapt the contents to meet your specific style.

Once you have reviewed the manuals and personalized the contents, you will have a solution for competently dealing with the majority of employee-related concerns in your dental office. You'll also have written documentation to consistently support each situation, which will alleviate you from continually rendering opinions.

We recommend you (or your designee) print the manuals and place them in a notebook binder. Then, review each policy and make edits as needed. For example, you may want the phone answered differently than the wording in our script or you may not want to include "Paid Holidays." In these instances, simply draw a line through the corresponding contents (use red or blue ink so it's easy to see) and then draw an arrow to the new text that you want included. If there is a policy that does not apply to your practice, simply draw an X through the whole policy and write "delete" in bold letters across the appropriate section.

When the editing is complete, input the changes into the original Microsoft Word file and save. You can then print as many copies as you need and make changes in the future as necessary.

In addition to the detailed information in our manuals, we suggest you retain other relevant handbooks and references that are essential to managing your practice (e.g., equipment manuals, software guides, etc). All manuals and guides should be stored together in an easily accessible area of your office for quick reference.

# OFFICE MANAGER MANUAL

**Note:** The following policies and procedures comprise general information and guidelines only. The purpose of these policies is to assist you in performing your job. The policies and procedures may or may not conform with Federal, State and Local laws, rules and regulations and are not offered here as a substitute for proper legal, accounting or other professional advice for specific situations.

Prior to implementing any of these suggestions, policies or procedures, you should seek professional counsel with your attorney, accountant and/or the appropriate governing or licensing board or any other applicable government body for a full understanding of all appropriate laws, rules, procedures or practices pertaining to your healthcare discipline or business activities.

## TRAINING MANUAL INFORMATION

### READ FIRST

The purpose for this General Policy Manual is to help you understand and use the basic policies needed to be an effective part of our dental team.

Our reasons for giving you this training manual are threefold:

1. To **provide written policies** and procedures relating to your job functions.
2. **To ensure you have a resource** for correcting or adding to the written exam questions (since we only accept 100%)
3. **To provide you with a future reference.** We do not expect you to memorize all of the policies relating to your job. But, we do expect you to refer back to the appropriate written material and review it on your own as well as with your office manager or doctor.

When you have finished reading the policies in this manual, please see your office manager or doctor for the written exam. When you have finished the exam, you will refer back to the appropriate policy in an open book style to change or add to your answers until your office manager or doctor are satisfied every question and each “active procedure” has been successfully executed without error.

Ultimately, we expect that your complete review of this manual will help you understand and use the general policies and communication vehicles of our office.



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## OPENING NOTE

Most dentists did not think about all of the management responsibilities that would befall them upon starting their own practice. It can be shocking and, at times, overwhelming if you are not trained on how to handle the “curve balls” that can and will be thrown at you during the growth and continued existence of your practice.

This manual was developed for the office manager. We have given you the “basic” tools you need to be an effective manager (budget, customized policies, how to hire and train staff, etc.). But like any tool, if not USED it just sits in the toolbox getting rusty.

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# **SECTION 1: THE BASICS**

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## INTRODUCTION

The office manager should have listed as a priority, in his/her duties and responsibilities for any health care practice:

**“To assist the staff in any way possible in becoming more efficient, productive and competent; thus, creating a more profitable business that delivers excellent service to a high volume of patients.”**

The foundation of this goal set by the office manager (and owner). The office manager must maintain a high level of competence and integrity that is not only witnessed, but mirrored as much as possible by the employees. The office manager is the first one to set the bar for the competence and integrity level of the business they run. If employees find themselves working for someone whose integrity is lower than their own, they will jump ship at the first opportunity. How can you work for someone you don't respect?

The majority of office managers didn't go to college for a degree in business, they just found themselves with the responsibilities of an office manager and everyone including the dentist started calling them the “office manager.” In most cases, they did not receive an increase in pay or bonus to accompany this new responsibility.

There is a new style of business sweeping the nation at this very moment called “open book management.” One of the basic principles (and there are many) of this new management style is sharing the profit of the company with the employees IF the company increases its net profit as a result of the combined efforts of the employees and owner(s). Each employee is held accountable for producing results that are quantifiable and improve the bottom line of the company.

The good news is that there are very exact management systems available for you at the (Insert Your Resource Center/Corporate Office Here) Cambridge that can enhance your existing qualities as an office manager and allow you the opportunity to reach even higher standards of excellence.

This office manager manual does not replace that training. But, it does give you immediate advice on how to implement some of the basic management systems. It also gives you the opportunity to personalize this manual for you and future executives or partners that come up the ranks as you expand your practice to the limits set by you and the owner.

One of the most time consuming jobs an office manager has is to:

- a) Write down all of his/her successful actions; and,
- b) Train and apprentice the person(s) getting ready to take over.

This manual was written with A and B in mind. We want you to **change, add or delete** anything you want in this manual so it becomes YOUR own personalized OFFICE MANAGER manual.

## MISSION STATEMENT

**Mission Statement:** To create and then improve upon an incredibly efficient and profitable practice that is well known in the community for excellent service to its patients.

We shall ensure management and staff work toward improving efficiency and a harmonious work environment at our practice. That effective and efficient quality patient care will always be our guide for decision-making.

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## TWO MANAGEMENT SYSTEMS

We implement a variety of management systems, but there are two systems that are critical to our operations and keep us from running into trouble. As the office manager, you need to be aware of these; and as time goes on, you will need to become much more than just aware of them. You should become very adept at using them.

- 1) Establishing and maintaining a monthly **budget** to exercise control over the operating expenses such as supplies, equipment, payroll, etc. The term budget is often misconstrued to mean “can’t spend money.” The word budget according to the Oxford Concise English Dictionary means: “The amount of money needed or available. Estimate of revenue or income and expenditure made by a company, family, private individual, etc.” The word’s origin comes from Old French **bouge**, meaning “leather bag”; and, from the Latin word **bulga meaning** “knapsack.”
- 2) Job description manuals for every position in the practice which are customized and unique to our dental office. The purpose for this is to provide written procedures which are very specific in relating **how to perform the duties** of each position in the office. As these job description manuals are created, we will have them available on our computer for future revisions as needed.

Having these written policies and procedures will give you a simple and easy way to **train** and **re-train** staff by referring to written established protocols that have been approved by the owner.

There is nothing worse than sitting down with an employee to correct something they have been doing wrong and not have the actual company policy or procedure to provide for reference and direction.

Without that simple piece of paper, it can become very tense and usually result in bad morale and disaffection to one degree or another. This is the main reason owners and office managers never confront and deal with employees until they’ve reached the point of firing them.

Many good and capable staff have either quit or been fired unnecessarily. The reverse is also true: many negative and nonproductive staff have remained on board when they shouldn’t have been allowed to stay. To save everyone a lot of headaches, just get your “How To” policies in writing and keep them up to date.

As the office manager, you will be expected to follow our policies and procedures just like the owner is expected to follow them. Management has to set a good example by not only following them, but by referring staff to them when they waver or ask “can you tell me what our procedure is on ....” This approach may take a little longer in the beginning, but you will be very glad you did in the long run.

## THE BUDGET

Obviously, expenses are a big factor in determining profit. We've worked with practices that made a lot of money, but did not have good control of their expenditures. These practices wasted a lot of their profit until they implemented a budget and stuck to it.

Having a budget doesn't mean you don't receive extra money for yourself or the practice. It simply means you will have MORE for either or both at the appointed time when you have saved this money in a special category in your budget.

Please notice the sample Budget form that you can develop into a spreadsheet format. All you have to do is input what you have spent in the past six months, divide the total by 6 to get a monthly average on each category, and then at the end of each month input what you actually spent. This way, you can stay on top of expenses by the month and not wait until the end of the year to find out how much was unnecessarily spent.

As you can see, the sample below has four columns. The first one "Budget" is where you will establish what the average amount is that you've been spending on each of the categories. You can easily customize these categories to fit your practice. The second column "Actual" is the column where you will indicate exactly how much was paid for the month in that category. The third column should be programmed to calculate the "difference" whether an increase or decrease. The fourth column should also calculate automatically when you insert the income for that month. It should then calculate what percent of the income was utilized for that category. The software program you use to calculate your budget is irrelevant. Just set your budget and stick to it.

With this information being kept current on a monthly basis, you will be able to determine if there are any expense categories needing closer supervision or if everything is in line. Good management stays on top of expenses and knows where every dime is going without having to spend a lot of time figuring it out.



## SAMPLE BUDGET

### Family dentistry

#### Expense Control Budget Form

Date: Jan '13

#### Income

81,226.00

	Budget	Actual	Difference	%
<b>Basic</b>				
Automobile (owner)	689	689	0	0.008
Auto service/gas	200	227	-27	0.003
Bank service charges	0	0	0	0.000
Building maintenance	300	0	300	0.000
Computer maintenance	300	1,611	-1,311	0.020
Computer support service	146	36	110	0.000
Continuing education	200	1,385	-1,185	0.017
CPA/Accountant	403	1,224	-821	0.015
Credit card service charges	263	9	254	0.000
Dues & subscriptions	225	320	-95	0.004
Equipment loan	1,660	1,444	216	0.018
Office supplies	288	700	-412	0.009
Insurance	3,000	3,031	-31	0.037
a. Biz overhead	25	299	-274	0.004
b. Disability	209	0	209	0.000
c. Health	287	0	287	0.000
d. Life	149	0	149	0.000
e. Malpractice	279	0	279	0.000
f. Other	124	0	124	0.000
Cell phone	90	90	0	0.001
Legal	50	0	0	0.000
License & permits	200	261	-61	0.003
Postage & delivery	177	167	10	0.002
Rent	2,733	2,854	-121	0.035
Telephone	347	307	40	0.004
Uniforms	89	183	-94	0.002
Utilities	208	212	-4	0.003
<b>Sub-Total Basic</b>	<b>13,558</b>	<b>15,740</b>	<b>-2,182</b>	<b>0.194</b>

**Marketing**

Advertisements	600	31	569	0.000
Charity	100	655	-555	0.008
Entertainment	50	0	50	0.000
Hotels	100	261	-161	0.003
Mail handling/lists	100	0	100	0.000
Meals	300	389	-89	0.005
Public Relations events (fairs)	700	0	700	0.000
Printing	50	0	0	0.000
Travel	200	199	1	0.002
Yellow Pages	134	134	0	0.002
<b>Sub-Total Marketing</b>	<b>2,284</b>	<b>1,669</b>	<b>615</b>	<b>0.021</b>

**Supplies**

Infection control supplies	300	1,122	-822	0.014
Large equipment (over \$3k)	0	0	0	0.000
Medical drugs	0	0	0	0.000
Dentistry supplies	0	0	0	0.000
Incentive prizes	133	59	74	0.001
Cleaning supplies	3,672	3,900	-228	0.048
Small equipment	22	0	22	0.000
<b>Sub-Total Supplies</b>	<b>10,140</b>	<b>12,131</b>	<b>-1,991</b>	<b>0.149</b>
<b>Total</b>	<b>25,982</b>	<b>29,540</b>	<b>-3,558</b>	<b>0.364</b>
Salary – staff	9,600.00	9,800.00	-200.00	0.121
Staff bonus	350.00	0.00		
<b>Grand Total</b>	<b>35,582.00</b>	<b>39,340.00</b>	<b>-3,758.00</b>	<b>0.484</b>

## CUSTOMIZED PROCEDURES

### POLICIES AND PROCEDURES

The definition of “job description” is a very explicit and simple write-up of exactly HOW TO perform the different functions of each position. We do NOT mean a checklist of the employee’s responsibilities that is the “normal” concept of a job description. Checklists are fine and are needed to give an employee a quick overview of their responsibilities, but they do not explain or show a new employee HOW to **DO** the job.

In addition to having written policies, it is extremely important to establish one of the best methods to train and “re-train” your employees.

Most training consists of “on the job” training by the previous person who held that position or someone who is trying to handle other duties while training the new employee at the same time. This approach takes away from the existing employee’s production time and gives the **new** employee a “shaky” start at best.

On-the-job training should actually be referred to as the “apprenticeship” aspect of an employee’s training regimen. Give a person the written (in some cases video and audio as well) materials, so they can study the concepts before tackling the actual responsibilities. This way, the concepts and the job activity come together a lot better and give the employee more certainty and understanding of their job.

The training system:

1. Customize all of the policies and procedures for the practice.
2. Create written exams for each job description manual to ensure the employee understands the policies and why they should be followed. Exam questions must address the RELEVANCE of the policy or procedure, not the mundane aspect. When the employee answers the question in essay form, you will know for sure whether or not they really understand the policy. If their answer is too brief or incorrect, the office manager or doctor simply has them re-read the policy or procedure and re-write their answer until the employee gets it 100% right.
3. Create specific procedure and role-playing drills to ensure the employee gets their “feet wet” and performs some of the functions of the job as they go through their written manual. It is impractical and unprofessional to give someone a manual full of policies and procedures, tell them to read it and expect them to automatically be trained. By getting involved with the functions **as** the employee goes through the reading, they gain more confidence in doing their job. And, confidence is the key to a loyal and dedicated employee – **someone who knows and understands how to do their job well.**
4. The last part of training a new employee is the Apprenticeship. This is a term and

practice that is slowly getting lost in the job industry or all industries for that matter. The apprenticeship is an extremely key aspect of training. This is where the employee gets to prove their worth to the practice and themselves by **practicing and demonstrating their abilities on the job**. According to the Oxford Concise English Dictionary the derivation for the word apprentice comes from Old French apprendre “learn.” Our modern society is losing the ability to learn. Can you imagine **not having** any form of lab or residency program during the dentist’s education? Every position of employment in our practice absolutely must have an apprenticeship checklist that requires either the dentist and/or the office manager to sign off on each individual step of the program, before the employee is considered actually trained.

5. It is recommended that you require the employee to get completely through all of their training and apprenticeships, before they are eligible for the bonus program. Once they fully complete the apprenticeship, give them a “Trained & Apprenticed” certificate that is framed and put on the wall somewhere in your practice.
6. As long as you treat your employees with respect, let them know how well they’re doing from time to time, and reward them (e.g., give them a free lunch or dinner now and then) for an exceptional job well done, you can inspire very loyal and long term employees. Some dentists completely “miss the boat” on this concept of acknowledging and rewarding their employees for jobs well done. This concept is one of the most important duties of an executive in any business – acknowledge, promote and reward your productive employees. If you are not generous in this area, you easily could lose a lot of revenue and profit.

A very large **expense** to a practice is the amount of money wasted on hiring and training new employees on a repeat basis. There is always going to be some necessity to hire and train new employees. However, if you have a standard proven technique for training employees that ensures they can DO the functions of their job, you have minimized this costly expense to your bottom line. Not to mention, you have improved your staff morale, because nothing improves morale like the confidence and competence.