

Onboarding	Qualified Level 1	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7	Level 8	Level 9	Level 10
New assistants/ Open Bay						Chairside Assistants				Leads / Managers	
Employee handbook signed	Open Dental	Pass off OpenBay Perfect appt w/ manager (1-2wk training)	Xrays (how to take quality x-rays)	Xrays (How to take quality x-rays)	Printing prescriptions	Situational awareness when assisting Dr. with procedure (hand placement for local, what comes next)	How to put supply order away	How to fix basic equipment/ trouble shooting	Float	Lead	Manager
Download payroll app, understand clock in and out	Provide high quality prophylaxis and flossing	Understand daily/weekly chair assigned tasks	Exam with dentist	Understand how to move pt x-rays	SDF: Where is it? How to correctly assist	Confirm tx plan with pt/parent before appt begins	Assist in operative visits (Fillings, crowns)	Assisting as backup in sedation (charting, crown sizes)	SDF competency	Track maintenance in log books (autoclave, run lines, traps changed, shock lines)	Train/evaluate dental assistants
Requesting PTO	Provide high quality prophylaxis and flossing for ortho patients	When to take which x-rays	Charting (Understanding what to bill out and when and adding detailed clinical notes)	Open Dental-Specific skills to know	60 day review for competency of levels 1-4	Opening & Closing sedation rooms by SOP	Assist in operative Pulpotomy/crown visit	Assisting in IV sedation	Change "O" rings on air / water syringe	Completed all personal development books	Ensure OSHA/HIPPA compliance standards
10 Levels criteria and annual review explained	Making an appointment	How to check verify and understand insurance coverage	Treatment planning (dual treatment plans)	How to do a recare appt in an OP room	Sealants with assistant/lead	Sealants Alone	Assist in operative for permanent teeth procedure (posterior)	Anticipation Competency for procedures	Sealant competency with all sealant materials	Run huddle/Monthly meetings	Systems in place to oversee sterilization and infection control protocols
Huddle/Meeting explained	NP visit- what do we say (parent instruction)	receiving and dismissing patients	Chart layout with everything open for exam	Impressions/ writing lab slips	CPR / BLS certified	How to clean an OP room	Assist in operative for Anterior teeth procedure	How to order and put away crowns	Book: Leadership and Self-Deception	Input supply orders	Annually review competency for all levels
Wearing correct t-shirt and being presentable with nametag	Turning compressor and gases on/off	End of day checklist and why it's important	Opening and closing x-ray rooms by SOP	Tooth chart-odontogram	How/where to track inventory	How to operate the N2O unit	Assist with Extraction procedure	Book: Extreme Ownership		Able to train/teach all levels 1-8 at an expert level	Scheduling DA's
Understand team schedule	how to do laundry (doing, folding, putting away)	Knee to knee appt-what points to go over/what do we say	Opening and closing Sterilization by SOP	Proficient Open Bay flowchart	Prophylaxis competency	Preparing and putting away instruments in sterile	Set up for OP procedure			Torch contact	Ordering oral sedation medications
Understand Core Values	Stocking supplies/ rooms at the end of day	Opening and closing Open bays by SOP	Explain difference between out different types of sedation: Nitrous, Nasal, Oral, IV	Competency of verifying insurance benefits and sealant coverage	Recent crowns/Band-Loop/Appliances	Know instruments / burs and which procedures to use them	Confirm NV plans with pt/parent after visit			Sign off on supply orders	Book club
Xray training	Operating the equipment in sterilization (autoclave, handpiece lubricator)	Opening and closing breakroom by SOP		Train/shadow Sealant appt.	Book: Mindset	Open and Close OP rooms	Giving verbal and written PostOp instructions for each procedure (ops, exts, sedation)			Book club	
	Follow OpenBay (perfect appt) checklist training list	Learn where open bay supplies stored		Treatment plan covered sealants		Book: 21 Irrefutable Laws	Blue Cloud credentialing				
							Book: Atomic Habits				