

### Front Desk Training Log

<b>Name:</b>	<b>Date:</b>	<b>Date in 90 Days:</b>	
<b>Goal: To attain efficiency in outlined training prior to 90 day review</b>			
<b>Task</b>	<b>Date</b>	<b>Trainee Initials</b>	<b>Trainer Initials</b>
<b>Scheduling</b>			
Change patient status: Paperwork, Ready, Chair, Finished, Complete			
Create New patient appointment (Add insurance info)			
Create or reschedule existing patient appointment			
Appointment types and lengths, Tetris schedule			
Confirm patient appointments			
Post out treatment under correct provider			
Document management; consent forms, drivers license, insurance card ect.			
<b>Handoffs and Phone Scripts</b>			
In network, out of network and not contracted insurance			
Collecting a deposit from a patient			
Appointment Scheduling scripts: missed, late, offering earlier appointment, same day cancelation			
Handoffs: check in and check out			
Collecting a patient balance			
Reviewing treatment plans and patient acceptance			
Treatment plan scripts: restorative objection, scheduling hesitation			
<b>Insurance</b>			
Understanding Insurance Breakdowns: maximums, deductible, waiting periods, missing tooth clause, tiered plans, calendar year, plan year			
Understand the difference: PPOS, HMOS and Medicare, Medicaid			
Verify Insurances and get Ins Breakdowns: call or get online			
Which insurances are we In Network and OON?			
Entering new and existing insurance information into Open Dental: Policy holder, independant plan, group plan, member number, group number ect.			
Reading and understanding policy coverages, limits Information			
<b>Treatment Planning and Patient Check out</b>			
Review, understand and correct treatment Plans			
Calculate patient portion at checkout and use credit card machine			
Understand patient ledger: balance, credit, adjustments			