

Practice Manager Training & Competency Outline

Purpose

This outline is designed to:

- Track onboarding progress of a newly hired Practice Manager
- Ensure competency in all front office and business systems
- Support development and refinement of Standard Operating Procedures (SOPs)
- Encourage continuous improvement in systems, patient experience, and team performance

Definition of Proficiency:

The team member can complete the task independently, accurately, and consistently without assistance.

Expectation After Proficiency:

1. Review and refine the existing SOP (or create one if missing)
2. Contribute **at least one enhancement** to improve efficiency, clarity, or experience

PHASE 1: CORE OPERATIONS

Daily Opening Responsibilities

1. **Prepare Practice for Patient Arrival**
 - Open facility (doors, lights, systems, ambiance)
 - Turn on computers, verify software access
 - Ensure reception area readiness

- Proficient
 SOP Updated/Created
 Enhancement Added: _____

2. **Review Voicemails**
 - Address overnight/weekend messages
 - Adjust schedule as needed
 - Return patient communication

- Proficient
 SOP Updated/Created
 Enhancement Added: _____

3. **Identify Missing Patient Information**
 - Insurance, forms, medical history, etc.
 - Prepare for seamless check-in

- Proficient
 SOP Updated/Created
 Enhancement Added: _____

4. **Manage Patient Communication Software**

- Respond to texts/messages appropriately
- Prioritize urgent needs

- Proficient
 SOP Updated/Created
 Enhancement Added: _____

5. **Prepare for Morning Huddle**

- Print/report schedules
- Identify production goals, gaps, opportunities

- Proficient
 SOP Updated/Created
 Enhancement Added: _____

6. **New Patient Readiness**

- Confirm forms completed
- Ensure x-rays received
- Appointment plan prepared

- Proficient
 SOP Updated/Created
 Enhancement Added: _____

Schedule Optimization (2–3 Days Ahead)

1. **Fill Hygiene Schedule**

- Fill next day before leaving
- Review 2–3 days ahead

- Proficient
 SOP Updated/Created
 Enhancement Added: _____

2. **Fill Doctor Schedule**

- Maintain productive scheduling
- Follow block/matrix guidelines

- Proficient
 SOP Updated/Created
 Enhancement Added: _____

3. **Create Daily “Money Schedule”**
 - Identify production tied to treatment completion

- Proficient
 SOP Updated/Created
 Enhancement Added: _____

Daily Execution Tasks

- Patient Check-In (Hygiene & Restorative)
- Referral Management
- Mail Processing
- Appointment Confirmations (48-hour standard)
- Patient Check-Out
- Treatment Plan Presentation & Financials
- Restorative Scheduling (block scheduling)
- Hygiene Scheduling
- Email Management
- Google Review Requests
- Claims Submission (accurate + complete)
- Payment Posting (EFT, check, etc.)

- Proficient in ALL
 SOPs Updated/Created
 Enhancements Added: _____

Weekly Responsibilities

1. Cancellation / No-Show Follow-Up
2. Patient Statements (21-day rule)
3. Unscheduled Treatment Follow-Up
4. Insurance Claims >30 Days

- Proficient
 SOPs Updated/Created
 Enhancements Added: _____

Monthly Responsibilities

1. Management Report (complete within first week)
2. Credit Balance Review
3. Delinquent Accounts (>60 days)
4. Collections Management
5. Hygiene Re-care Follow-Up

- Proficient
 SOPs Updated/Created
 Enhancements Added: _____

PHASE 2: LEADERSHIP & BUSINESS MANAGEMENT

(Initiated after Phase 1 proficiency is achieved)

Daily

- Collaborate with doctor + team on operations
- Maintain optimized provider schedules

Weekly

- Oversee employee benefits (PTO, ESSL, insurance, etc.)
- Manage marketing / social media

Bi-Weekly

- Payroll processing + timecard accuracy

Monthly

- Accounts Payable
- Bank & Credit Card Reconciliation
- Compensation Calculations:
 - Associates
 - Hygiene
 - Team Bonus Structures
- Team Meeting Planning & Facilitation
- Website Updates / Blog Content

Quarterly

- Provider Care Tax Estimates
- Sales & Use Tax
- Team Building & Culture Events

Annual

- Fee Schedule Updates
- CPR Certification
- OSHA / HIPAA Training
- MN Care Tax Filing
- Employee Handbook Updates
- Employee File Management
- Performance Reviews
- W-2 Distribution
- MN Secretary of State Filing
- Insurance Participation Review/Negotiation
- License Renewal Tracking

As Needed

- Performance Management (PIPs)
- Temporary Staffing Coordination
- Recruiting & Onboarding
- 90-Day Reviews