

Office Manager aka Team Lead

Role Description

This is by no means all-inclusive – this list is designed as a template for customization based on your unique practice model and systems.

* It's our philosophy that every role in the practice 'manages' themselves, regardless of the size of practice. The term 'office manager' or even 'lead' indicates that everyone has to **be** managed and doesn't have the capability to do their job effectively. The 'team lead' role in a dental office can often create an unhealthy culture of dependence. The goal is interdependence, where all roles work together and bring value to create synergy.

However, we understand that some practice models may require a 'lead' admin or clinical role. If that's the case, read on!

First and foremost, you might consider another title...

- Director of Happiness
- Solutions Expert
- Team Mentor
- Team Guide

Be creative and come up with your own title for ALL roles that embodies the core values of your practice!

It should be clear that this role is NOT...

- Drama dump
- Keeper of all of the systems
- THE leader of the practice
- THE Decision-maker – (everyone on the team should have the ability to make decisions based on the core values and vision of the practice)
- Micromanager

- Babysitter
- Tattletale
- Go-between
- The one with all of the answers
- An individual that hangs their hat on the 'title'
- A know-it-all
- A parent
- Hirer/firer
- A hermit that camps out in the back office all day

What a leader position' is...

- The 'Quarterback' of the practice – ability to see the big picture because of their high level of situational awareness
- Resource for tools that will support and reinforce the doctor's vision
- Source of encouragement and positivity
- An individual that has the ability to redirect fellow team members to the source of their frustration rather than participating in gossip
- Solutions Expert – this doesn't mean they are the source of all solutions, but they have the ability to show confidence in others to come up with solutions.
- An individual with a high sense of emotional intelligence and intuition.
- A mature individual that embraces the role of 'leadership' by example
- A reader and learner
- A great delegator
- An excellent communicator
- An individual that embodies the '[Ideal Team Player' attributes](#), humble, hungry and smart
- Willing and able to do anything that is asked of fellow team members

Other areas where this lead role may contribute...

- Proficient in current practice software, awareness of updates, backup procedures and technical security
- Work with doctors to stay abreast of human resource information pertinent to the practice
- Ability to work with team to create a culture of accountability.

Some choose to have their lead admin role handle their accounting. While it's preferable to hire an accountant, if this is your arrangement, you might consider doing this outside of patient hours so that they can be fully present in leading and supporting the team.

ADMINISTRATIVE TRAINING TOPICS

*this is the same as the front/admin office checklist-
a lead role should be proficient in these areas,
delegating so that nothing falls through the cracks*

- How to answer the phone
- How to schedule a new patient over the phone
- How to greet and check-in patients
- How to schedule according to block scheduling
- Practice software
 - o Chart creation
 - o Patient Updates
 - o Post payments
 - o Scheduling system
 - o Creating Reports – end of day, re-care/outstanding treatment
- Collecting money
- Outside funding source logistics
- New Patient Interview Process

- How to update voice message
- Cross-train clinical
 - *How to turn-over a room*
 - *Sterilization*
 - *Tray Set-up*

DAILY CHECKLIST

UPON ARRIVAL

- Log on to your computer
- Check email and phone messages
- Update voice mail with daytime message
- Prepare office for patients – lights, music, etc.
- Participate in morning huddle
- Return morning messages

THROUGHOUT DAY

- Check-in patients upon arrival: update patient information
- Assist new patients with filling out forms when needed
- Communicate late arrivals, patient needs and requests, etc. with back office
- Answer phone by the third ring when not face-to-face with a patient
- Enter new patients into the practice management software upon scheduling, send new patient paperwork and welcome letter, and request records from previous office
- Schedule each day to your production goal
- Follow block scheduling so that procedures are scheduled in the appropriate blocks.
- If accepting assignment, verify insurance for new and next day patients
- Utilize office communication platform to fill open slots for today/tomorrow.

- Follow up on unscheduled treatment
- Check out patients, ideally collecting patient's financial obligation when reservations are secured.
- Schedule outstanding treatment
- Post patient payments
- Courtesy calls/texts for upcoming patient appointments through practice software or by phone
- Look ahead up to one week to be sure all restorative cases have pre-paid, have outside funding secured, or at minimum have a signed financial agreement.
- Check-in lab cases
- Check reception area and patient bathroom for cleanliness and stock supplies
- Check mail, sort and distribute

END OF DAY

- Prepare End of Day Report
- Daily collection reconciled with end-of-day
- Prepare deposit and give to appropriate team member/doctor with report
- Print Route slips and distribute for next day
- Turn off workstations/printers
- Update phone message and turn to night mode

