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Staff Member   
Procedure Guide

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# INTRODUCTION

This guide is a tool to demonstrate the specifics for your position and the procedures for operation. It breaks down each component of the staff member position and the expectations for performance. For detailed patient scenario scripting examples, please refer to ePractice Manager’s online document library on your company’s portal.

# PART 1: KPIs

Key performance indicators (KPIs) are statistics that measure the performance in achieving key objectives, such as general office and job-specific productivity.

All successful businesses use KPIs to monitor the areas of their organizations. Without KPIs, a business is running blind. Running without monitoring the appropriate KPIs is equally as bad. Without KPIs, you and the business must make assumptions and guesses rather than depend on factual statistics. This can result in ineffective management and a lack of expansion for the practice, as well as upsets between management and staff.

## Your KPIs

You should have a set of specific KPIs for your role within the practice. If you do not, meet with your office manager to determine which metrics would be most appropriate to track productivity for your position. Your KPIs should be minimally tracked on a monthly basis, but ideally on a weekly basis.

## Effectively Using KPIs

To use KPIs effectively,

* ensure that the KPIs you use truly and accurately measure your role’s productivity
* regularly post the metrics to trackers, including graphs if applicable
* regularly evaluate the trackers/graphs to see what trends are emerging

For example, if you see a significant increase from one week or month to the next, examine what actions were implemented prior to the increase. Find out what the successful actions were, and make sure you continue them.

Similarly, if you see a meaningful decrease in a trend, you must take effective action to halt the decline. Look into any significant changes in your job duties and/or actions that may have occurred in the weeks leading up to the drop. Did you stop doing something or neglect anything that was working? Were additional job duties given to you that led to neglect of successful activities?

The point in either case is to use your graphs to observe what is going on, and then take the appropriate action.

# PART 2: HOW TO BE A MORE SUCCESSFUL STAFF MEMBER

Your personal success will be proportionate to your efforts and accomplishments in improving yourself and contributing to the practice.

## Do More

Consider your job description to be the foundation of your responsibilities, not the boundary. If you do not have a full job description, meet with the office manager to write your own. Look for new ways to contribute to the practice.

## Personal Presentation

Make it easy for the people responsible for employee advancement to visualize you in the new position you want. Studies have shown that people have radically varied reactions to others based on the way they dress, their personal grooming, and their communication. Be sure that you are presenting a professional image with your appearance. By looking and acting the part, you will convince yourself and others that you deserve to excel.

## Be a Problem Solver

Problem solving is a key skill for an employee to demonstrate. Do not just report problems to your supervisor—also propose possible solutions and recommendations.

## Be Visible

It is not enough to do a good job—you must also be seen doing a good job. Keep people informed about what you are doing by

* writing updates about your projects and sending copies to all pertinent parties
* being your department or group spokesperson
* volunteering for high-visibility projects
* writing for the practice newsletter
* asking to be invited to meetings where you can make a contribution

## Improve Your Communication Skills

Your advancement as an employee has a lot to do with how well you can communicate. Ask yourself which communication skills you most need to improve: one-on-one communication, listening, writing, or giving presentations. Speak with the office manager and work out ways to strengthen your communication abilities.

## Invest in Yourself

Continue to learn and grow. There are a lot of great books, tapes, and training programs available to help you increase your value. The more you can learn about your products, industry, and how to manage your own talents, the more of a resource you will be to the practice.

## Prove Yourself

Help your employers justify your advancement or pay increase by demonstrating how you have

* exceeded your job description duties
* cut costs in some area of the practice
* helped to increase productivity
* improved the work environment

## Know the Terminology

As a staff member in a medical office, it is important that you understand and have references to all relevant terminology used in the practice.

Avoid using medical terms with patients unless you also define the terms using common, everyday language. Patients may not understand what you are saying, which can contribute to a failure to keep appointments, follow care instructions, and accept and/or follow treatment plans.

Visit the ePracticeManager Document Library for

* general dental terminology
* dental prosthetic terms
* terms describing cavities and their restorations
* a list of commonly used abbreviations

Refer to these lists whenever you don’t understand any term or abbreviation that you see or hear. A more extensive glossary of dental terms from the American Dental Association (ADA) can be found [here](http://www.ada.org/en/publications/cdt/glossary-of-dental-clinical-and-administrative-ter).

# PART 3: MEETINGS

As a staff member, you will be expected to participate in two regular meetings: the daily morning huddle and the staff meeting.

## Daily Morning Huddle

The daily huddle meeting should occur 15 minutes prior to the start of each workday. It is a quick daily meeting used to inform the team of practice progress and the upcoming production for the day to ensure smooth patient experiences. The office manager normally runs the morning huddle, and everyone scheduled to work that day should be in attendance.

## Staff Meeting

Staff meetings provide a predictable time for the entire staff to come together to communicate, focus, plan, and coordinate as a team. Staff meetings should be quick, upbeat, and productive. Depending on your office’s schedule, they will occur minimally once per month, but possibly each week.

The following topics are normally covered in staff meetings:

* 1. Anything that is appropriate from the previous meeting
  2. A review of the KPI graphs and the plan of action based upon the statistics, including feedback and suggestions from staff on how things can be improved and strengthened
  3. How the graphs that are being discussed met the goals that had been set in the previous meeting and what the new goals should be
  4. A review of any new office policies and educational materials that the office manager and/or doctor wants the staff to know
  5. Discussion of any future plans that the practice may have
  6. Discussion of any active or planned promotional activities
  7. Notification of any important general announcements
  8. Time for the doctor to address the staff regarding any issues of importance

If it appears that more time will be needed to go over any particular issue(s), the staff will be informed that a longer meeting will be planned within the next 1-2 weeks, and staff will be notified of such a meeting in advance.

# PART 4: OFFICE POLICY

A policy is a set of basic principles and associated guidelines that are formulated and enforced by the governing body of an organization to direct and limit its actions in pursuit of long-term goals.

*An office policy is basically the agreements within a practice on how the group and its members operate.*

In our office, the practice’s management creates policy in order to establish group operational guidelines and agreements that forward the mission of the office.

Speak with the office manager to get a copy of the general office policy for the practice. It is vital to the smooth operation of the office that all members of the group know and follow the general office policy[[1]](#footnote-1).

# PART 5: JOB DESCRIPTION AND MANUALS

## Job Descriptions

As mentioned earlier, you hold two roles at the practice:

1. You are a team member
2. You are the specific role you were hired for (e.g., receptionist, dental assistant, implant coordinator, etc.)

Both of these roles have their own specific job duties and job descriptions.

A job description is not just a summary of duties; it is a complete explanation of *how* to perform a particular position in a practice. A job description must include detailed checklists of the specific functions and actions that one does on a daily, weekly, and monthly basis. This part of the job description is referred to as the job duties checklist.

In addition to the checklists, it must include detailed write-ups on every aspect of the job, commonly used forms, and procedural diagrams as needed.

A job description must include a complete explanation of how to do every function related to that specific role within the practice, including:

* Daily, weekly, and monthly checklists
* "How to" write-ups on job functions
* Commonly used forms
* Procedural diagrams

For example, as the receptionist, one of your job duties is likely to include answering questions from people calling in with practice inquiries. A “how to” write-up would include the suggested dialogue used to answer different types of patient questions.

The benefits of having a written job description are that

* **Your position will be easier to cover in your absence.**This is a very important part of being a team member. You will occasionally need to be absent from work due to illness, personal responsibilities, or vacation. A full and complete job description provides helpful tools and guidance to those covering for you, and this will ensure that the practice continues to function smoothly.
* **A full, complete job description makes it easier to train a replacement and easier to promote.** When employers are considering promotions, one factor that usually must be considered is the replacement of the person being promoted.

If your position does not currently have a full and complete job description, then you should make it your responsibility to create one. Ask for guidance and help from your supervisor and get approval and sign-off.

***Remember: Existing job descriptions should be reviewed periodically and updated to include new policies and procedures.***

## Job Manuals

Every employee of the practice must have an up-to-date job manual kept in their work area for easy reference. If you work in an area that patients frequent, keep the manual in a cabinet where it is out of sight but is still easily accessible.

The manual should contain

* general office policy for the practice
* all policies specific to your role within the practice
* your team member job duties checklist
* your specific role job duties checklist
* all procedural “how-to” write ups for your position

# PART 6: KEEP IT IN WRITING

Everyone in the practice is very busy and often has several things going on at once. While there is definitely a need for open verbal communication to keep everything running smoothly, there are many things that come up during the course of the day that do not need to be relayed verbally.

It’s important to respect other people’s time, attention, and peace of mind. Delivering every request, reminder, and order verbally causes interruptions and inefficiency. For that reason, the majority of communications should be emailed.

There is no intention to stop free-flowing verbal communication amongst the team members; instead, we simply want to keep the practice running smoothly throughout the day with minimal interruptions or distractions.

## Office Manager Communication

The office manager (and often your supervisor) must know what is going on in the practice in order to take effective action. A primary function of an office manager is to be of service to the staff, and to help ensure a smooth-running and pleasant office. If there is a situation, then the office manager must be made aware of it to take appropriate action.

If there is a time-off request, then your supervisor must be made aware to ensure that your duties are properly covered so the practice runs smoothly in your absence.

The following types of communication should always be kept in writing:

* Policy or procedure questions
* Requests for time off
* Pay questions, and any HR-related communications
* Office/staff situations or difficulties

When writing requests or reports, whether it’s for a policy question or staff difficulty, *stick to the facts.* If there is something that has upset you, try to take a deep breath and a short walk before you begin writing a report to ensure you’re sending the most accurate information.

# PART 7: PATIENT CONFIDENTIALITY

## General Information

Maintaining patient confidentiality is a very serious matter. The handling of patient information is regulated under federal law, and great care must be taken to ensure that patient information is not made available to unauthorized persons. *Violation of federal law can result in substantial fines and, in some cases, imprisonment.*

Patient information that is protected under federal law is called Protected Health Information (PHI). PHI is generally defined as any information that can be used to identify a patient or that which relates to a patient’s past, present, or future health condition, healthcare services, or payment for those services.

Some specific examples of PHI included:

* Patient name
* Photograph
* Physical mailing address
* Email address
* Social security number
* Driver’s license number
* Names of relatives
* Billing statements
* Diagnosis codes
* Treatment codes
* Imaging results
* Checking account information
* Credit card numbers

Since the bulk of the information stored and used is PHI, *you should act as if all patient information is PHI.*

## Accessing PHI

You may only access a patient’s PHI to the extent that it is a part of your job duties. It is *never* acceptable to look at PHI “just out of curiosity” or out of concern for a friend, relative, or co-worker. This applies to *all* staff, including doctors.

PHI should only be accessed or disclosed for the following reasons:

* Providing medical treatment
* Processing payments
* Conducting business operations
* Public health purposes as required by law

Always disclose the *minimum* amount of information necessary to accomplish the task. You many not access or disclose PHI otherwise unless the patient has given written permission. These rules also apply to deceased patients.

## Protecting Stored PHI

PHI can be in several forms: spoken, printed, and electronic. The rules regarding the handling of PHI apply to all of these forms. For this reason, you may not call out for a patient in the waiting room by their full name or use it within hearing distance of others. Also, use caution when speaking to patients on the telephone or in-person at the front desk to ensure that PHI is not disclosed to others within hearing range.

You must also help protect information from unauthorized access that is stored in the office, in hard copy files, and on computers.

The following is a list of guidelines to help protect stored PHI:

* Never leave paper records unattended and in open view—secure them in a file cabinet or drawer if you must leave your workspace.
* Shred documents and destroy magnetic media that contains PHI.
* Do not share your computer credentials with others or log someone else into the computer system using them. Change your password quarterly and include upper case, lower case, and special characters.
* Ensure that your computer has a password-protected screen saver or other system that automatically locks an unused computer after a short period of time. Do not leave computers unattended when unlocked, and close programs containing PHI when they are not in use.
* Do not take PHI out of the office without permission from your supervisor. PHI leaving the office must remain physically secure at all times. Mobile devices, such as laptops containing PHI, must be encrypted and remain physically secure. Do not forward office emails containing PHI to a personal account that can then be accessed from an unsecured device.
* Do not download unauthorized files, or install unauthorized programs on your work computer.
* Do not send PHI to patients or other providers via regular email without written permission from the patient. Electronic transmission of PHI should be handled through encrypted email.
* Do not open email attachments that you are not expecting, even if the message is from a familiar person. Do not click on links that are embedded in emails, and do not respond to spam—simply delete it.

When information that must be protected is lost, stolen, improperly disposed of, hacked into, or communicated to others who have no official need to receive it, it is referred to as a “breach of Protected Health Information.” It is your responsibility to immediately report any PHI breaches to the office manager.

1. You can download an example general office policy in the ePM Document Library. [↑](#footnote-ref-1)