



FRONT OFFICE *Rocks*
ROCK STAR FRONT OFFICE TRAINING

Video Training Implementation Manual

Getting Started

- Identify and Assign Training Modules
- Incorporate the Training
- Recommended Order of Training Modules

Receptionist

Scheduling

Treatment Coordinator

Financial Coordinator

Office Manager



Congratulations and welcome to Front Office Rocks! We are excited to work with you to help you grow and train your team!

While the focus of integrating our Front Office Rocks training program is on growth and creating the ultimate customer service culture within your practice, it is important to be aware that success is contingent on implementation. We have written these implementation guidelines to help you reach your practice's potential.

We recommend that you sit down with your team and let them know you are investing your time and financial resources into this program, not just to benefit the practice but to help each of them reach their own highest potential in their jobs. The program is designed to help get your team on the same page by offering congruent training across the practice.

At the end of the manual, you will find useful tips and integration suggestions to help you successfully integrate our entire suite of training videos into your practice.

A. Identify and Assign Training Modules

Guided by the training modules, areas that are missing or that need to be integrated, expanded, or enhanced may now be identified. Each module has a specific purpose and it is useful to review current best practices to gain insight into the potential growth of the practice and review outcomes and implementation strategies.

To identify where to begin, ask yourself what outcome you expect at the conclusion of a training module, which role will benefit the most from which training, and what can be learned by completing the training series.

For example, I would like to create the ultimate customer service culture in my practice and think that my Receptionist is the right person to begin that shift. As a result, I assign the **Importance of Great Customer Service** and **Telephone Skills and Etiquette** to the Receptionist. Once he or she has completed both modules, a combined series of twelve videos, I can expect a greater understanding of what can be learned from exceptional customer service experiences and telephone communication skills.

Now that you have identified who may benefit from training and where to begin, the office program manager can assign additional areas of study to ensure continuity of training and completion of the entire module for that position.

Continue this assessment and assignment process throughout the roles in your office. You will find a broad spectrum of training modules offered throughout each of the five dental office positions.

B. Incorporate the Training

There are over 180 on-demand videos available in multiple categories. The training is ready when you and your staff are. Each video is ranges from five to twelve minutes long and can be viewed on a desktop, laptop, phone or any handheld device. Each video is followed by a ten question quiz to reinforce and ensure comprehension of the material. You can set up notifications which will alert you when an employee has completed a video and its subsequent quiz, including their score. Notifications allow you to see how your staff is progressing through their assigned training.

The time commitment varies and is up to each office. Many offices will have employees watch videos individually and then re-watch a series as a group during a team or staff meeting, morning huddle or when it fits best. By watching a video or video series together, your staff can discuss how they can best customize and implement the information learned into their practice. We highly recommend role playing as it assists in honing in on the essential customer service skills necessary to create the ultimate customer service culture in your practice.

C. Recommended Order of Training Modules

During your implementation, we suggest following the course material in an order that makes the most sense for each position in your office. The individual sections will walk you through a brief description of each course within a role, followed by an organizational chart that outlines all of the videos contained within each category. We will begin with **Receptionist**, followed by **Scheduling** and **Treatment Coordinator**, then **Financial Coordinator** and **Office Manager**. In our experience, the order of roles coincides with the typical flow of an employee as they grown within an office. As important as job-specific training is, remember that cross-training creates a collaborative environment where staff members respect each other's role and workload. We suggest using cross-training as ongoing tool in your office to introduce employees to other areas of their own job, as well as functions in the office that are closely related to their own. At the end of each section, you will find a Resources page that contains a list of policies, associated lesson documents and areas we have identified as potential cross-training opportunities.

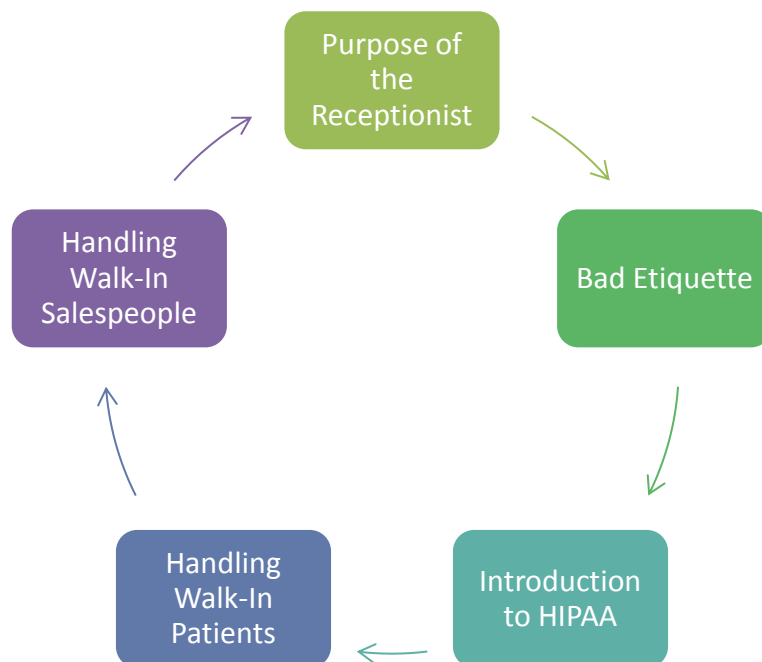
Let's begin.

RECEPTIONIST

Reception Organization and Management

During this course, you will learn the purpose of your role and how to present yourself and represent the front desk in the most effective way. Dental front office training is the most useful tool in your training because our on-demand videos will walk you through each phase of your position, including handling walk-in patients, salespeople and privacy laws (HIPAA). A dental office is a busy place and you will experience phones ringing, anyone walking in the door at any time, and a variety of issues that will evolve from day to day. This course will prepare you to handle, with professionalism and ease, whatever comes your way.

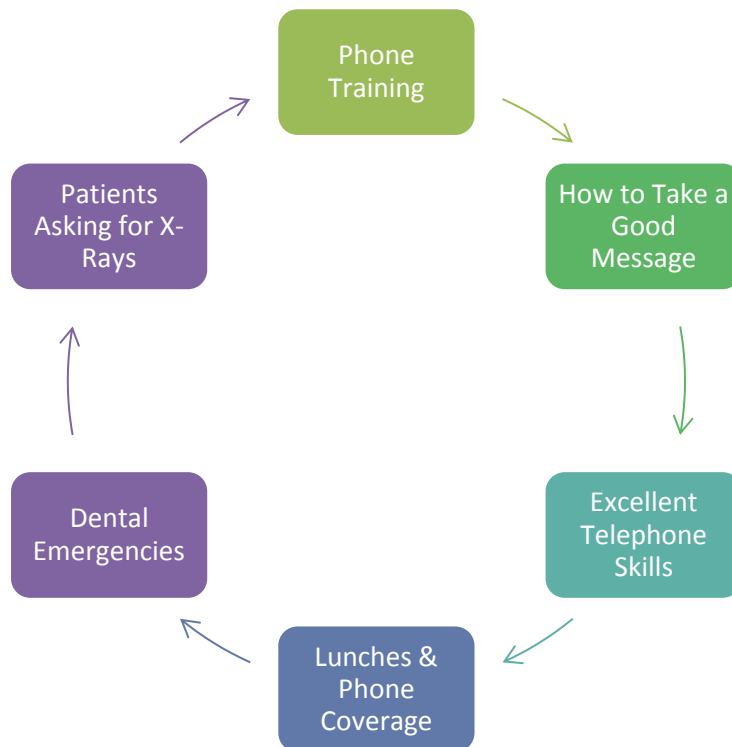
Front Office Rocks recommends that you complete the **Purpose of the Receptionist** and **Bad Etiquette** training videos first, followed by **Introduction to HIPAA**, **Handling Walk-In Patients** and **Handling Walk-In Salespeople**. By the conclusion of this category, you will feel ready to tackle anything that that happens at your front desk.



Telephone Skills and Etiquette

During this course, you will learn professional techniques for managing the front desk phone and phone calls. This phase of your online dental receptionist training will take you through required telephone skills and various types of patient calls, including patients asking for x-rays and dental emergencies. The phone at the front desk is the dental office's life line. This course will prepare you to handle, with expertise and efficiency, whatever calls come in to your office on a daily basis.

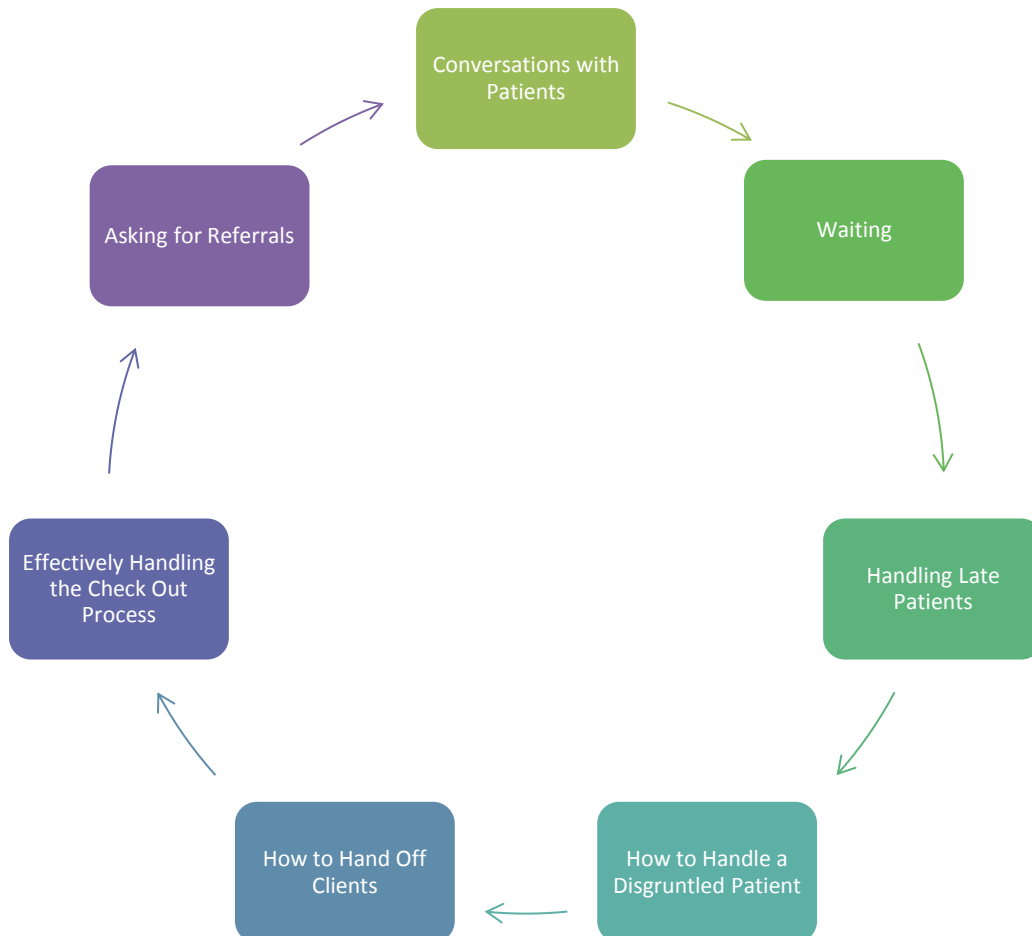
Front Office Rocks recommends that you complete the **Phone Training**, **How to Take a Good Message** and **Excellent Telephone Skills** training videos first to establish a solid foundation in your telephone training. Next, follow with **Lunches and Phone Coverage**, **Dental Emergencies**, and **Patients Asking for X-Rays** to learn how to handle various call situations. When you have completed this category, you will feel confident and ready to answer your patient calls.



Customer Service

This is the third of the six courses in your dental front office training series for the role Receptionist. This course focuses on your customer service skills in seven key areas of communication at the front desk. Effective communication is vital to your success in customer service and managing the day-to-day patient operations in your office. The videos in this series focus on the details surrounding a patient visit, such as waiting, late or disgruntled patients, as well as handing off patients and asking for referrals.

Front Office Rocks recommends that you complete the **Conversations with Patients**, **Waiting**, and **Handling Late Patients** videos first to familiarize yourself with best known methods of patient communication and customer service. Next, you can move on to **How to Handle a Disgruntled Patient**, **How to Hand Off Clients**, and **Effectively Handling the Check Out Process** to increase your proficiency in the more specific situations that you may encounter. Finally, complete **Asking for Referrals** to get acquainted with the skills needed to help the practice grow.



New Patient Calls

During this course, you will develop your telephone skills to include techniques for answering various types of new patient calls. New patient calls have an entire series dedicated to them because of the impact they have on the growth of your office. This portion of your dental front office training will navigate through five types of new patient calls and how to handle each. Remember, the phone is the lifeline to the dental office and how it is handled is a direct reflection on not only the new patient's first impression of the office but also the growth of your new patient numbers. This course will prepare you to answer each new patient call with confidence and ease and convert those new patient calls to scheduled patients.

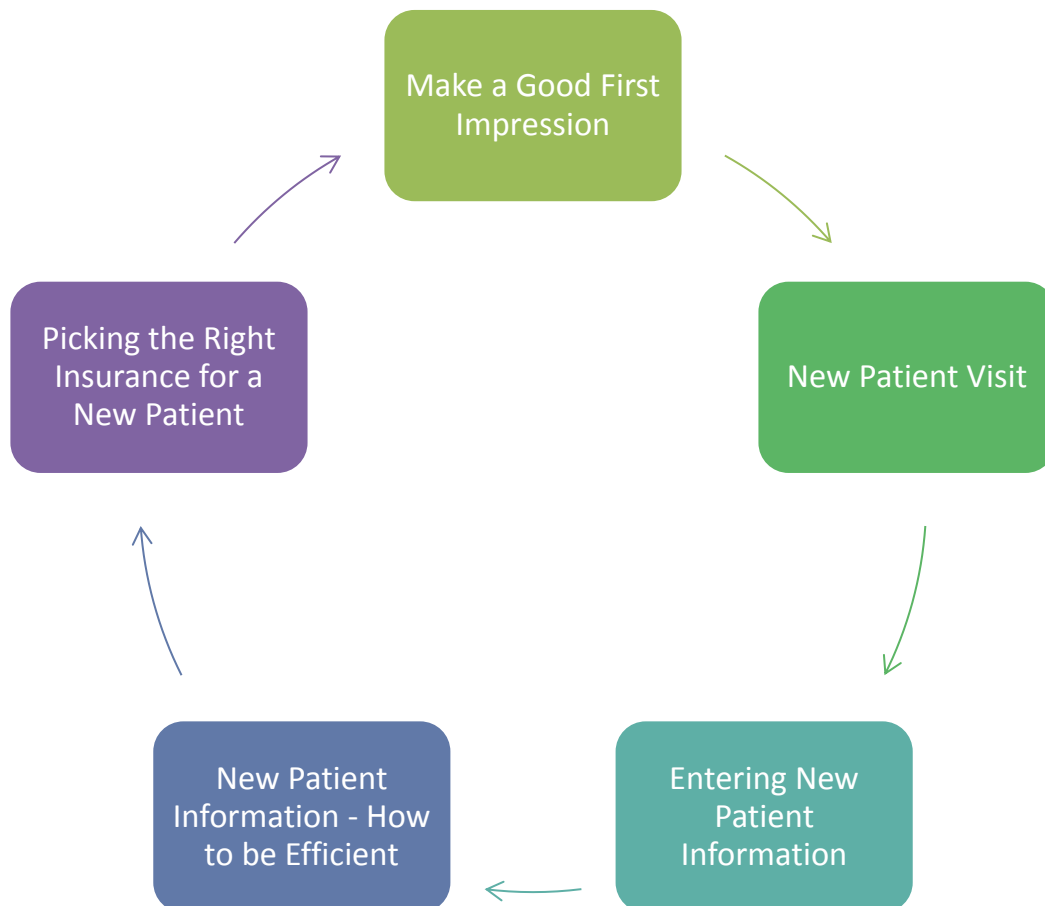
Front Office Rocks recommends that you complete **Answering New Patient Calls**, **Getting New Patients Scheduled in 48 Hours** and **New Patient Interview** first. Then, complete **Answering PPO Questions** and **Second Opinion and Shoppers** to learn how to address those very specific call types. At the conclusion of this series, you will be prepared to answer any new patient question that comes your way.



New Patient Appointments

During this course, you will take your proficiency in patient handling directly to the actual new patient appointment. As this is the first in-person glimpse the patient has into your day to day operations and how your office functions as a team, new patient appointments are your opportunity to represent the practice with professionalism and competency. The interaction you have with a new patient will determine whether the patient returns. This portion of your dental receptionist virtual training will direct you through the steps of a new patient appointment and how to approach each successfully.

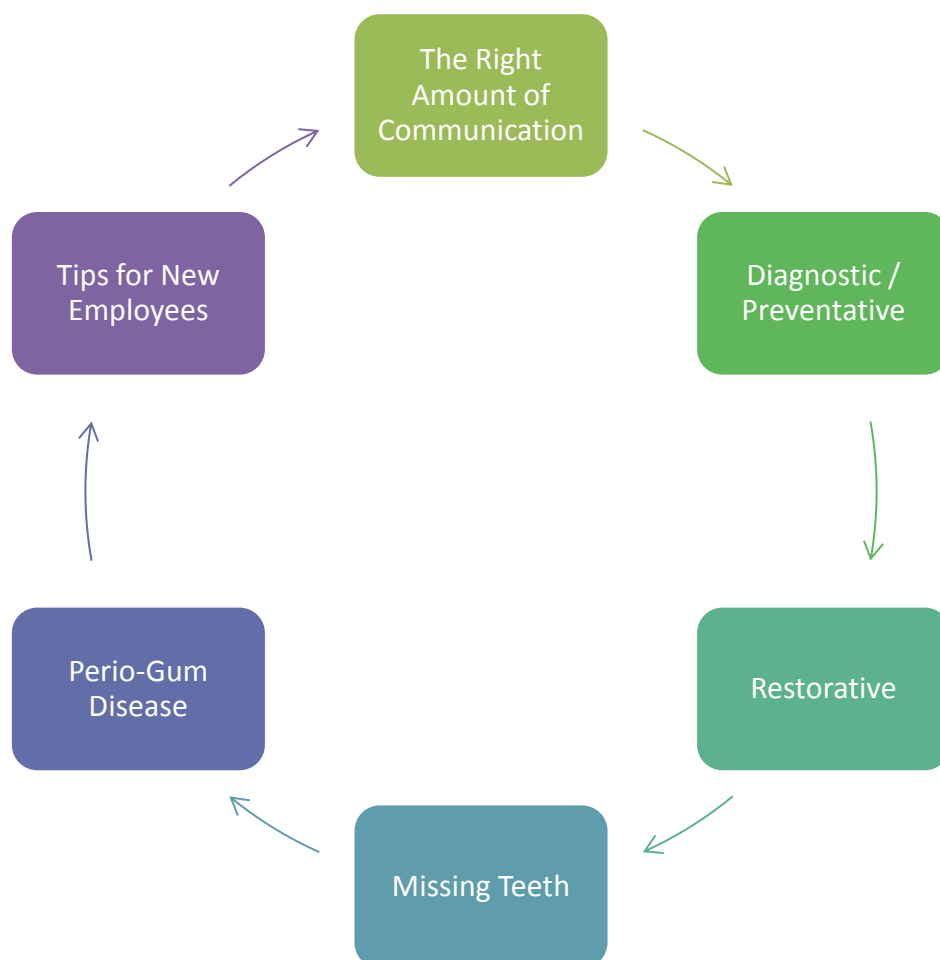
Front Office Rocks recommends that you complete **Make a Good First Impression** and **New Patient Visit** first. Then, follow with **Entering New Patient Information, New Patient Information – How to be Efficient** and **Picking the Right Insurance for a New Patient** to acquire the skills that ensure your new patient has been entered into your system accurately. After completion of this series, your office will be prepared to best serve the needs of your new patient.



Introduction to Dental

During this course, you will be introduced to the most efficient way to communicate with others in your office, as well as various dental terms, procedures and treatments. This is the final series in your dental receptionist online training and will conclude with a conversation among several experienced office team members who provide their insight into how to be a success in your new role. Whether you are new to dentistry or bring years of experience to your position, it is valuable to spend time reviewing key functions in your role.

Front Office Rocks recommends that you complete **The Right Amount of Communication** and **Diagnostic / Preventative** first. Then, follow with **Restorative**, **Missing Teeth** and **Perio-Gum Disease** to expand your knowledge of frequently used terms and treatments in many dental offices. Finally, finish the series with **Tips for New Employees** to hear what actual dental office staff say are the most important attributes of any new team member.



RESOURCES

Available Receptionist Policies

Entering New Patient into Eaglesoft
Entering New Patient Paperwork
Front Office Opening and Closing List
Hand Off Policy
Office Noise Policy
Receptionist Monthly Tracking Sheet
Practice for the Right Amount of Communication
Patients Asking for X-Rays to be Forwarded
New Patient Form – Child
New Patient Call In Form

Available Receptionist Lesson Documents

The Right Amount of Communication
Diagnostic / Preventative
Restorative
Missing Teeth
Perio-Gum Disease
Handling Late Patients
Asking for Referrals
Entering New Patient Information
New Patient Flow Chart
Selecting Correct Insurance Information for a Patient

Cross-Training Video Suggestions for the Receptionist

Scheduling

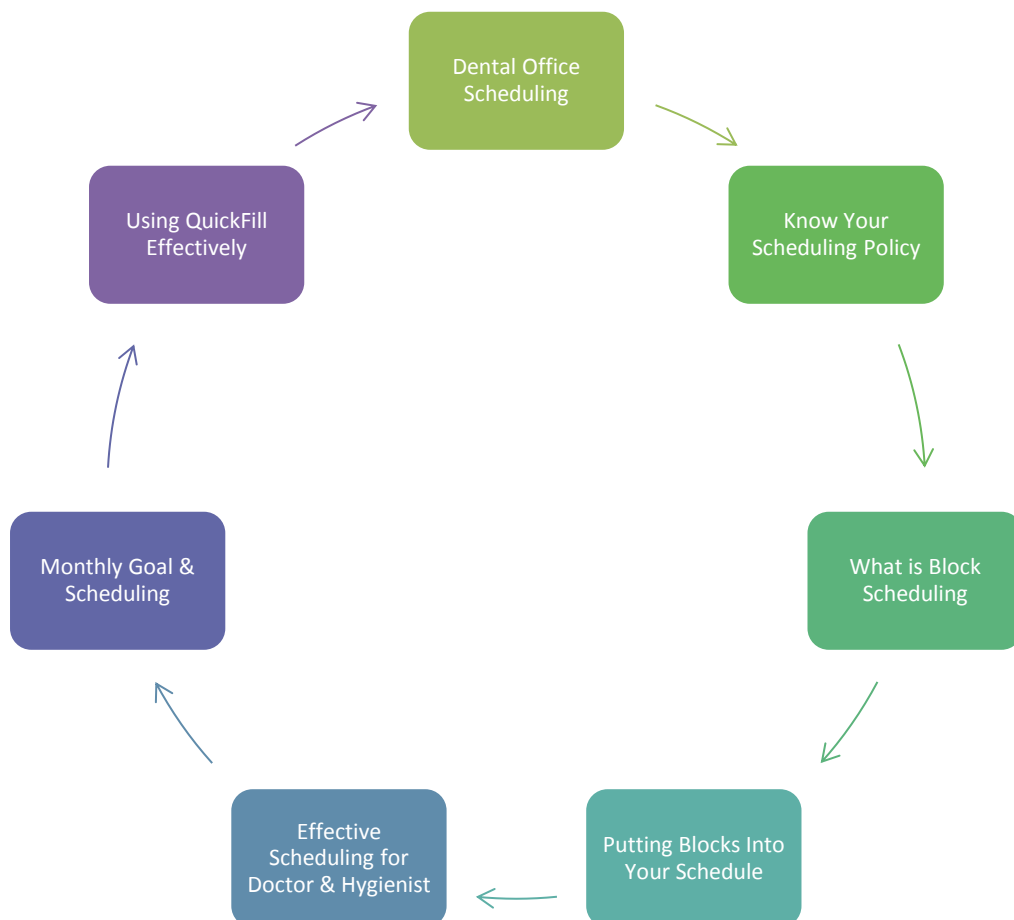
- What is Block Scheduling
- Know Your Scheduling Policy
- Cancellation Phone Calls
- Confirmation Calls
- Next Day Reviewer
- How to Offer an Appointment
- Confirming Suggestions and Resources

SCHEDULING

Understanding Scheduling

During this course, you will be introduced to the basics of scheduling. Before a deeper dive into more complex scheduling issues, it is important to understand the foundation of the office schedule. The schedule serves as the center of operations for a practice and its accuracy and effectiveness has a direct impact on the doctor and hygiene schedule and monthly financial goals. This first video series will introduce you to block scheduling and other key factors in managing a productive schedule.

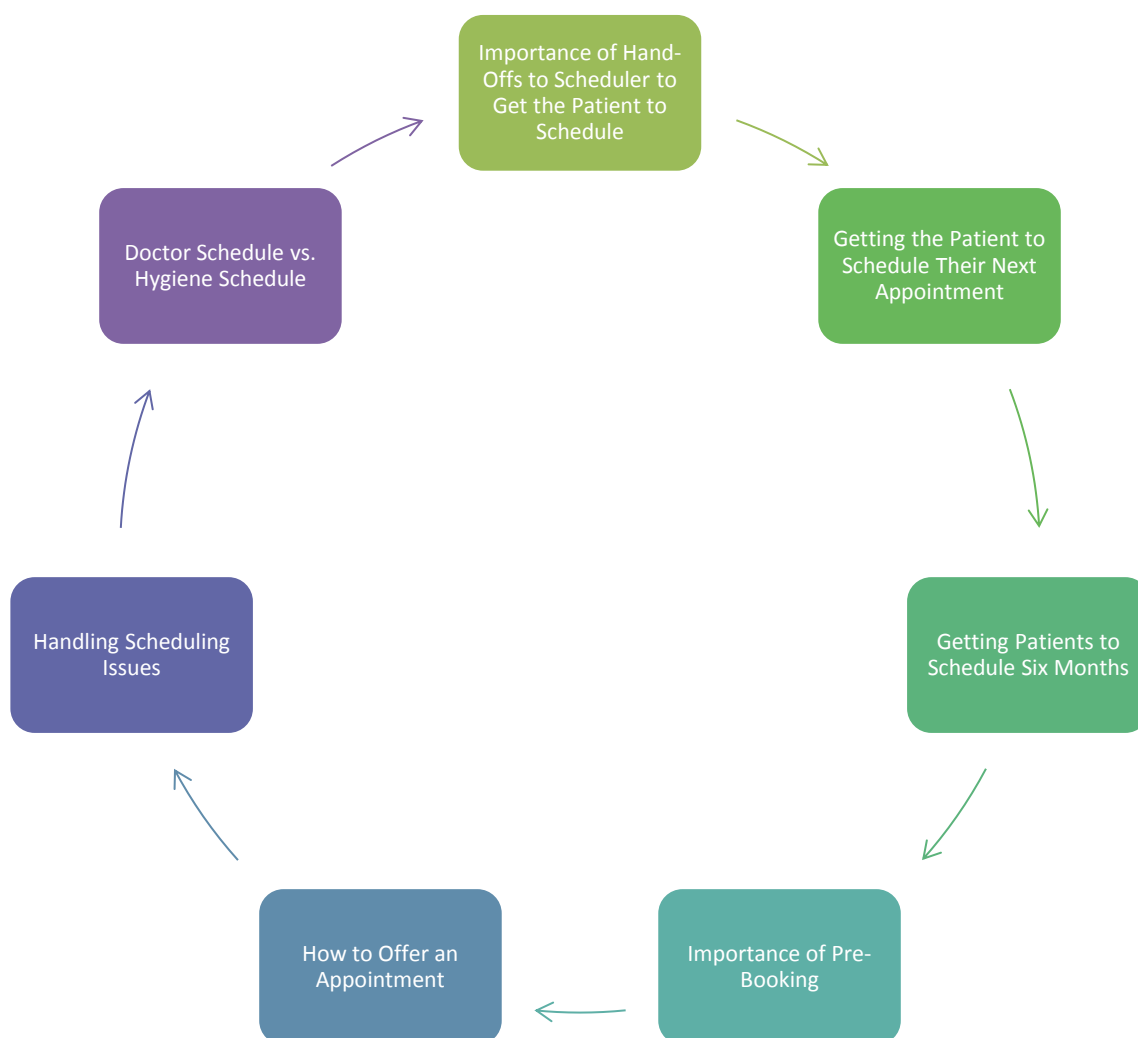
Front Office Rocks recommends that you complete **Dental Office Scheduling**, **Know Your Scheduling Policy**, **What is Block Scheduling** and **Putting Blocks Into Your Schedule** first. Then, follow with **Effective Scheduling for Doctor and Hygienist** to learn the specifics for each type of clinician. Finally, finish the series with **Monthly Goal and Scheduling** and **Using QuickFill Effectively** to breakdown and determine the office's monthly and daily goals, as well as how to use QuickFill to achieve those goals.



How to Get Patients to Schedule

Now that you have a better understanding of the basics of scheduling, it is important to examine how to get your patients on the schedule. In this course, we take a closer look at hand-offs, follow-ups, pre-booking and other various schedule topics, to improve your ability to control the office schedule. The videos in this series will demonstrate specific patient schedule scenarios and how you can successfully navigate each and achieve a full and productive schedule.

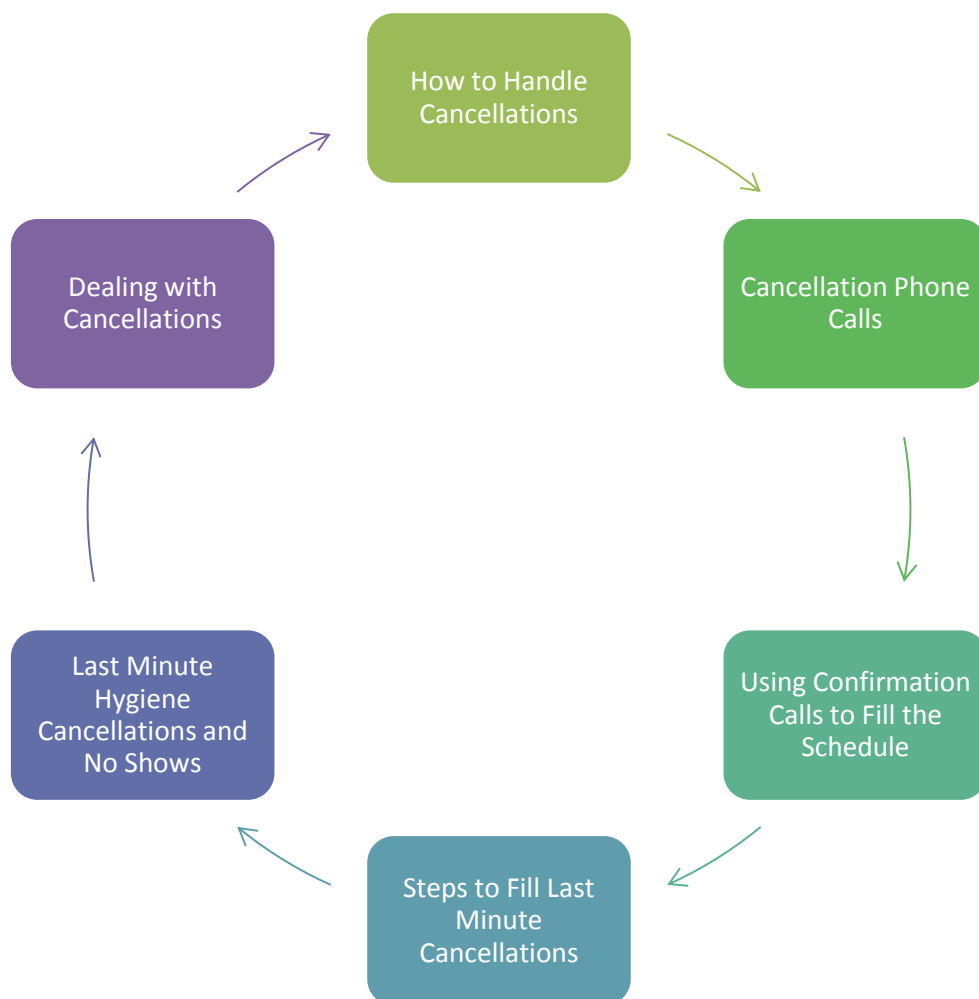
Front Office Rocks recommends that you complete the **Importance of Hand-Offs to Scheduler to Get the Patient to Schedule**, **Getting the Patient to Schedule Their Next Appointment** and **Getting Patients to Schedule Six Months** first. Then, follow with the **Importance of Pre-Booking**, **How to Offer an Appointment** and **Handling Scheduling Issues**. Finally, finish the series with **Doctor Schedule vs. Hygiene Schedule** to understand the differences between them and how to address the specific scheduling needs of each.



How to Handle Cancellations

Now that you established a strong foundation in scheduling and how to get patients to schedule, you can move on to cancellations. Cancellations and no-shows are inevitable in dental offices and here we will address how to handle cancellations while maintaining control over the schedule. This video series will look closely at the ways patients cancel and the steps to take to maintain a full schedule in spite of cancellations.

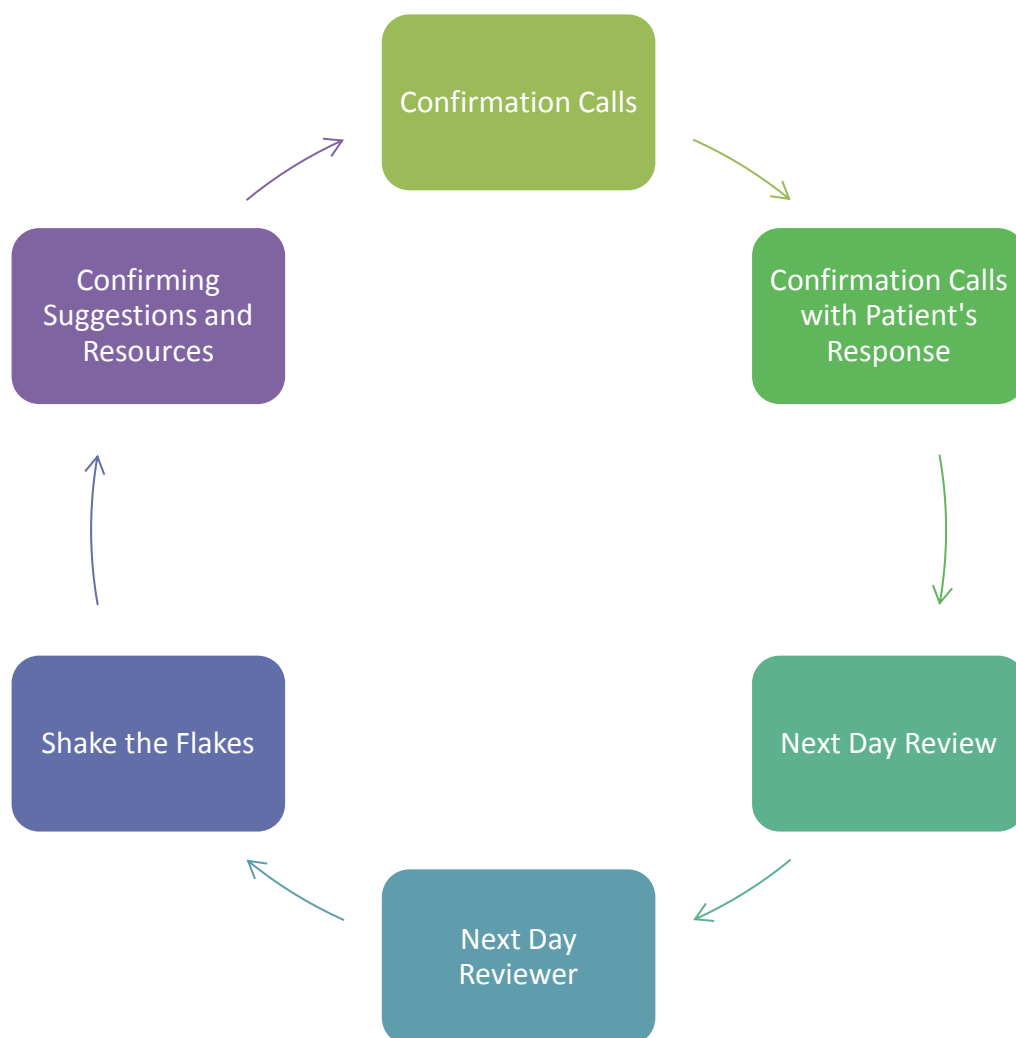
Front Office Rocks recommends that you complete **How to Handle Cancellations**, **Cancellation Phone Calls**, and **Using Confirmation Calls to Fill the Schedule** first. Then, follow with **Steps to Fill Last Minute Cancellations** and **Last Minute Hygiene Cancellations and No-Shows** to learn the specific actions you can take when you receive last minute cancellations. Finally, finish the series with **Dealing with Cancellations** for general tips and suggestions to manage all cancellations in your office.



Confirming Appointments

This series begins the second half of Scheduling training. In order to keep the schedule full and productive, the office must have appointments and it is imperative that those appointments are confirmed. We have addressed cancellations and no-shows and here we will look closely at how to effectively confirm appointments through phone calls, patient responses and next day reviews. This video series will develop the procedures used in your office to confirm your patients on a regular basis and will provide real examples of how to make sure patients show up for their appointments.

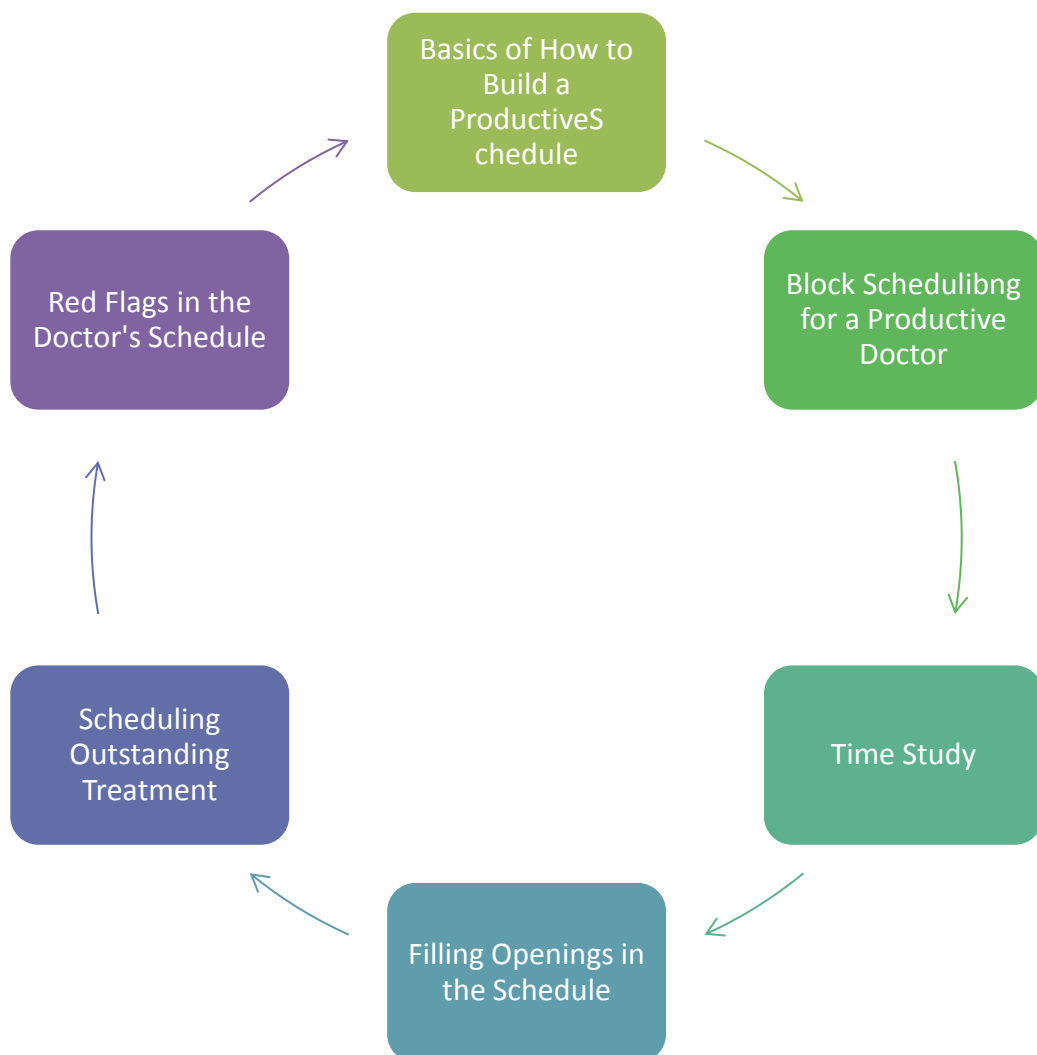
Front Office Rocks recommends that you complete **Confirmation Calls** and **Confirmation Calls with Patient's Response** first. Then, follow with **Next Day Review** and **Next Day Reviewer** to learn the steps you can take during the next day review to prepare the entire team for upcoming appointments. Finally, finish the series with **Shake the Flakes** and **Confirming Suggestions and Resources** for tips and suggestions to manage the office's confirmation process and "appointment flakes."



Productive Scheduling for the Doctor

This course looks closely at the specific needs of the doctor's schedule, including block scheduling for production, filling openings and outstanding treatments. Up to this point, we have addressed the importance of a productive schedule, but now it is time to learn what circumstances impact the doctor's schedule and what techniques you can use to keep it filled and productive. This video series will examine best known methods of filling, studying and operating the doctor's schedule successfully.

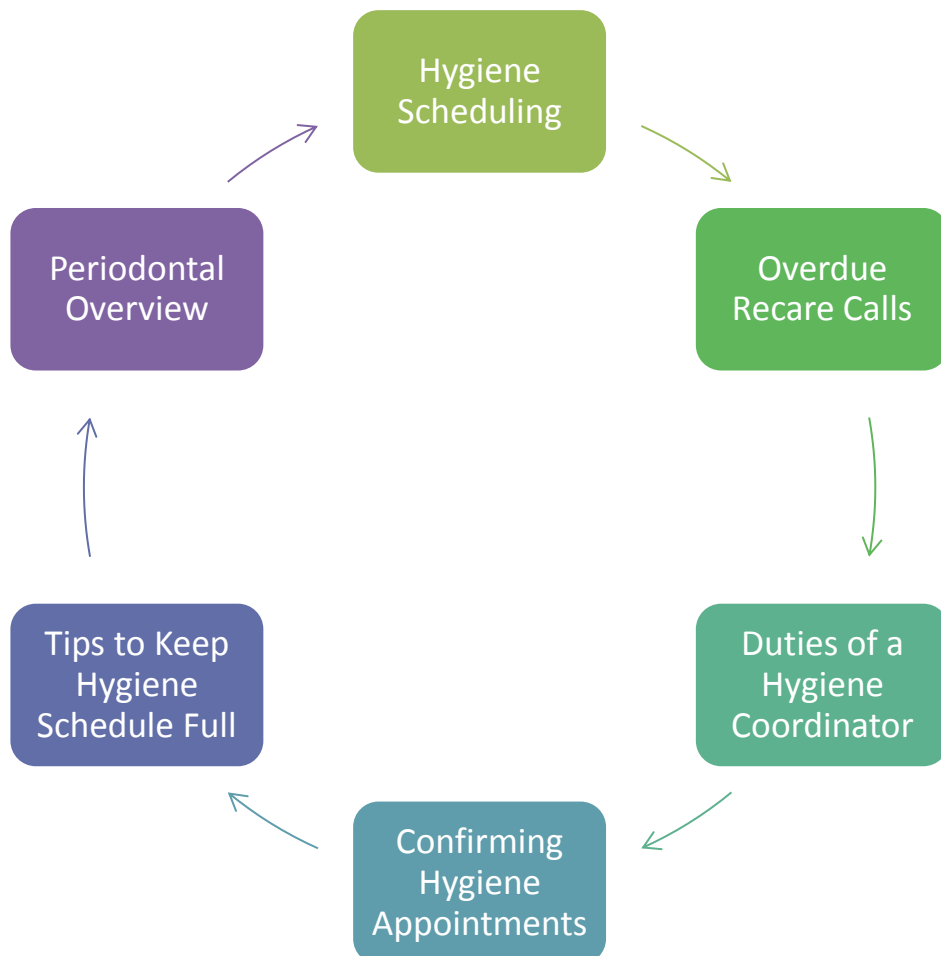
Front Office Rocks recommends that you complete **Basics of How to Build a Productive Schedule**, **Block Scheduling for a Productive Doctor**, and **Time Study** first. Then, follow with **Filling Openings in the Schedule** and **Scheduling Outstanding Treatment** to learn how to fill appointment gaps that may occur on a daily basis. Finally, finish the series with **Red Flags in the Doctor's Schedule** for guidance on what "red flags" to look for and how to avoid them.



Building an Efficient Hygiene Schedule

This is the final series in the Scheduling course and it takes a closer look at the hygiene schedule and its importance to the office's productivity, how to keep it full and what your role as Hygiene Coordinator requires. Now that you are well versed in scheduling and the importance of a productive schedule, it is time to learn what steps to take to keep a full hygiene schedule, confirm hygiene appointments and address overdue recare appointments. This video series examines best known methods of successfully scheduling, confirming and keeping a full hygiene schedule.

Front Office Rocks recommends that you complete **Hygiene Scheduling**, **Overdue Recare Calls**, and **Duties of a Hygiene Coordinator** first. Then, follow with **Confirming Hygiene Appointments**, **Tips to Keep the Hygiene Schedule Full**, and the **Periodontal Overview** to become even more vested in the efficiency of the hygiene schedule and the patient's overall health.



RESOURCES

Available Scheduling Policies

Appointment and Confirmation Policy
Doctor Scheduler Checklist
How to Offer and Appointment
8 Hour Day Outline Doctor Schedule
8 Hour Day Outline Hygiene Schedule
Recare Call Policy
Scheduling Policy
Next Day Reviewer Scheduler
Hygiene Scheduling Guidelines
Hygiene Scheduler Monthly Tracking Sheet
Hygiene Schedule Priority
Change of Start Time Confirmation
Patients Who Have Not Been In For a Long Period of Time
Patients Running Late Policy
Hygienist Lunch Policy

Available Scheduling Lesson Documents

What is block scheduling?
Doctor Schedule versus Hygiene Schedule
How to Offer an Appointment
Offering Appointments to Secondary That Want Primary
Next Day Reviewer
Scheduling Outstanding Treatment


Cross-Training Video Suggestions for Scheduling

Receptionist


- Phone Training
 - Excellent Telephone Skills
 - Lunches and Phone Coverage
 - Getting New Patients Scheduled in 48 Hours
 - How to Hand Off Clients
 - Asking for Referrals
-

Cross-Training Video Suggestions for Scheduling (continued)

**Treatment
Coordinator**

- 
- Asking the Patient to Pay
 - Being Prepared to Collect a Patient Balance
 - Follow Up Treatment Plan Calls
 - Following Up on Unscheduled Treatment
-

**Financial
Coordinator**

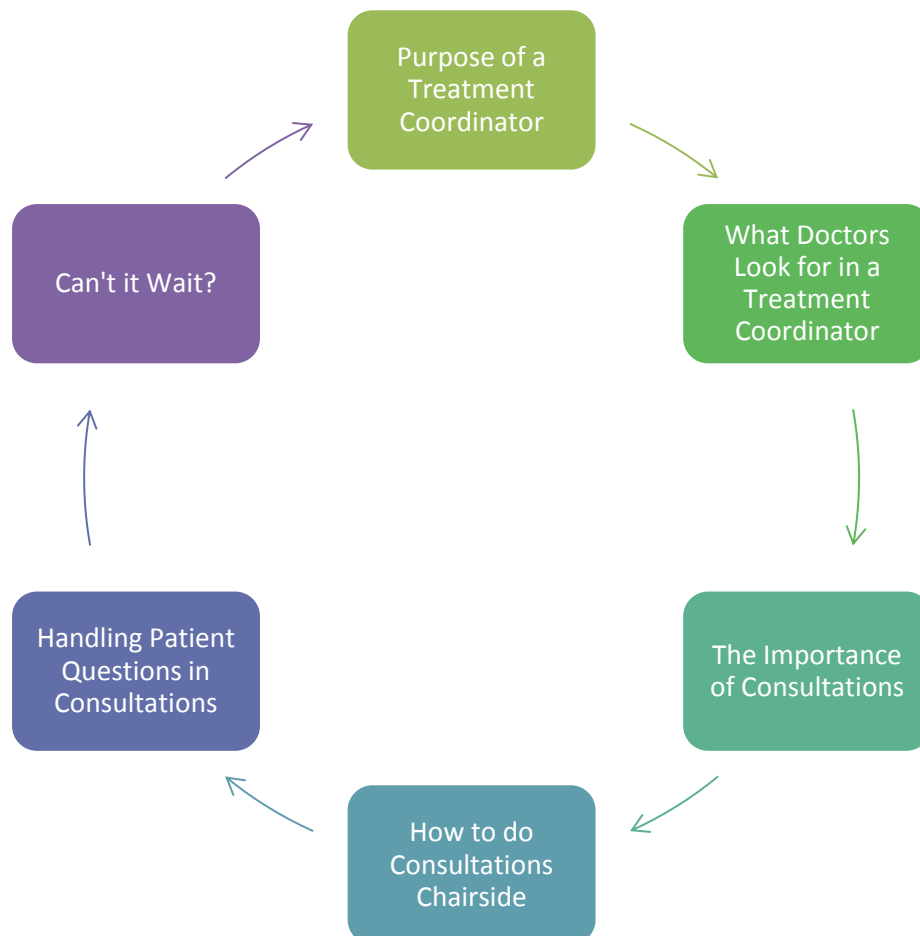
- 
- How Dental Codes Work
 - Insurance Terms
 - Coverage Book
 - Explaining Balance to Patient
-

TREATMENT COORDINATOR

Consultations

This is the first series in the Treatment Coordinator course and it serves as an introduction to the importance of consultations, your role as the Treatment Coordinator and what doctors look for in a Treatment Coordinator. The role of Treatment Coordinator is patient facing and is tasked with the responsibility of attending patient consults and subsequently scheduling the patient's prescribed treatment. This video series takes a closer look at what happens during a consultation, where they should be held and how to handle patient questions to provide the best care possible for each of your patients.

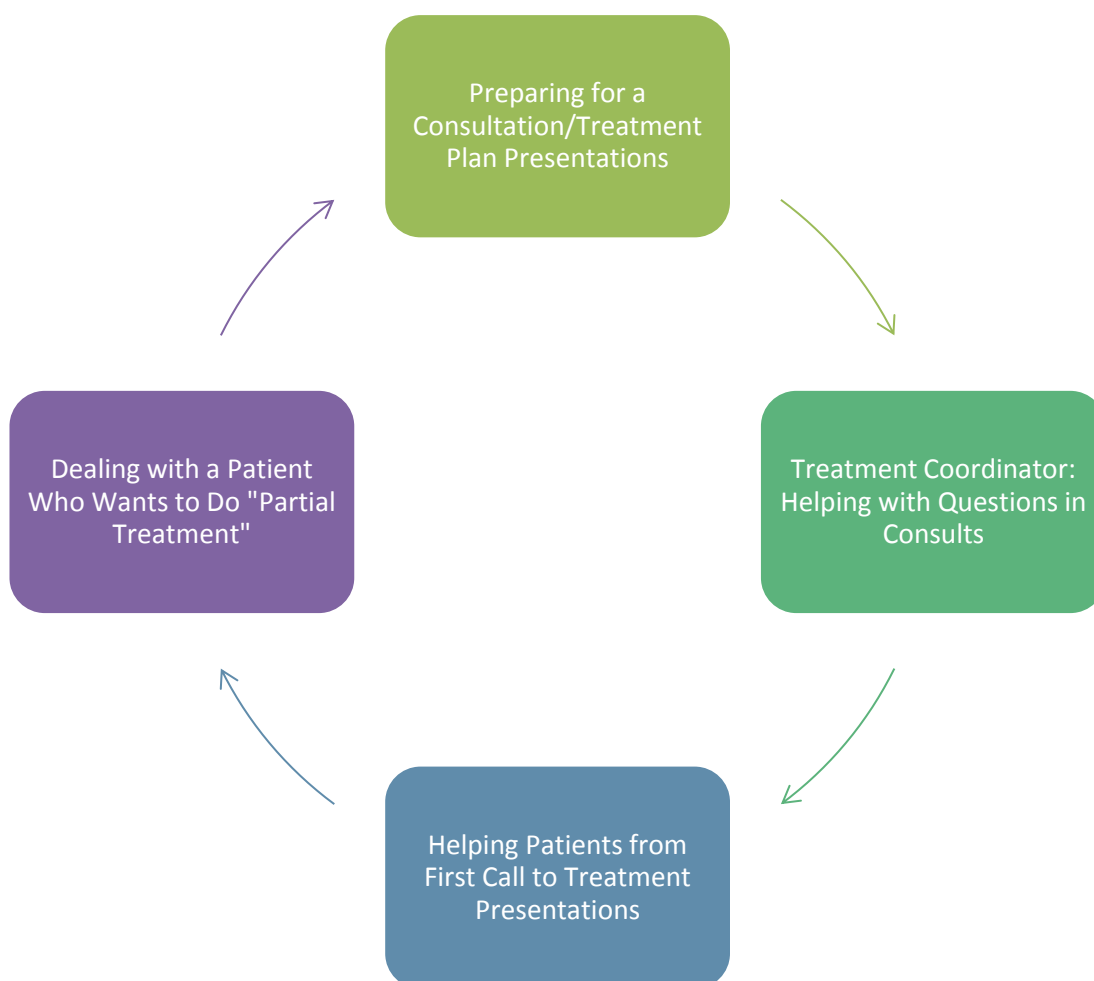
Front Office Rocks recommends that you complete **Purpose of a Treatment Coordinator** and **What Doctors Look for in a Treatment Coordinator** first to become better acquainted with your role and responsibilities. Then, follow with **The Importance of Consultations**, **How to do Consultations Chairside**, **Handling Patient Questions in Consultations** and **Can't it Wait?** to become accustomed with what happens during a consultation, what questions you can expect from patients and how to answer the question: Can't it wait?



Treatment Planning

This is the second series in the Treatment Coordinator course and here you will take a closer look at the many facets of treatment planning. As the Treatment Coordinator, you are present during treatment consultations and may face a variety of issues and questions regarding the patient's treatment plan. This video series will walk you through multiple consultation scenarios from simple questions clarifying dental terms to dealing with patients who only want to do a portion of their treatment. You will also learn how you can prepare for consultations and treatment plan presentations.

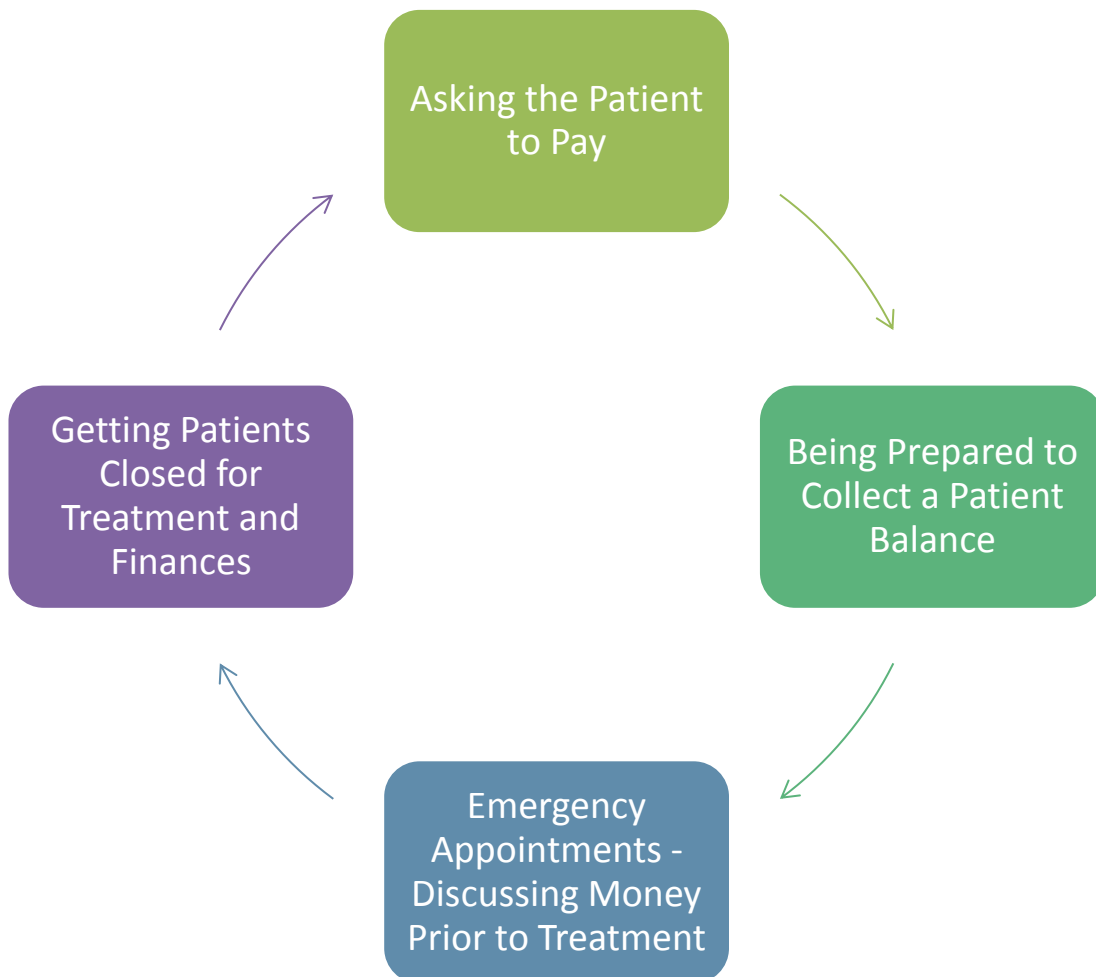
Front Office Rocks recommends that you complete **Preparing for a Consultation/Treatment Plan Presentation** first to become more familiar with the steps you should take each time to prepare for a consultation. Then, follow with **Treatment Coordinator: Helping with Questions in Consults, Helping Patients from First Call to Treatment Presentations** and **Dealing with a Patient Who Wants to Do "Partial Treatment"** to better understand what questions you can expect from patients, how to answer them and how to manage a patient who only wants to do partial treatment.



Discussing Money

This is the third series in the Treatment Coordinator course and it looks at the specifics of money and patients. As the Treatment Coordinator, you will be responsible for discussing how a patient will pay for their prescribed treatment. This task can be uncomfortable or overwhelming, if you are unprepared. This video series demonstrates how you can handle discussing money with confidence and ease. We will walk you through multiple payment scenarios and provide you with the guidance you need to successfully navigate asking for payment, patient balances and payment for emergency services.

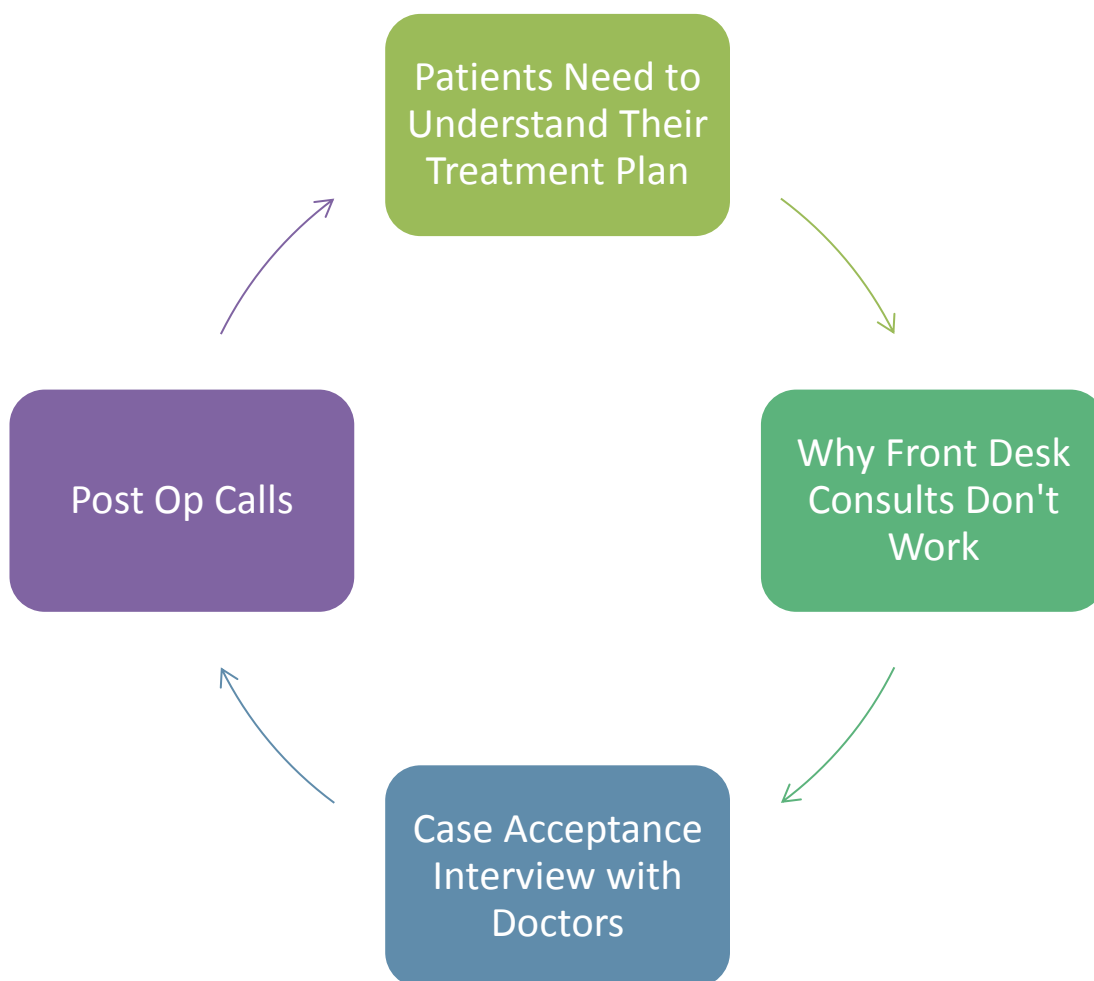
Front Office Rocks recommends that you complete **Asking the Patient to Pay** and **Being Prepared to Collect a Patient Balance** first. Then, follow with **Emergency Appointments – Discussing Money Prior to Treatment** and **Getting Patients Closed for Treatment and Finances** to complete the foundation of how to handle most money discussions with the patient.



Patient Acceptance

This series looks at the needs of your patients and how to ascertain their acceptance of the prescribed treatment plan. Before a patient accepts treatment, they must first understand the treatment plan and how that treatment impacts their overall health. This video series takes a closer look at how you can help patients understand their planned treatment; ensure they accept treatment and how to provide follow up care through post op phone calls.

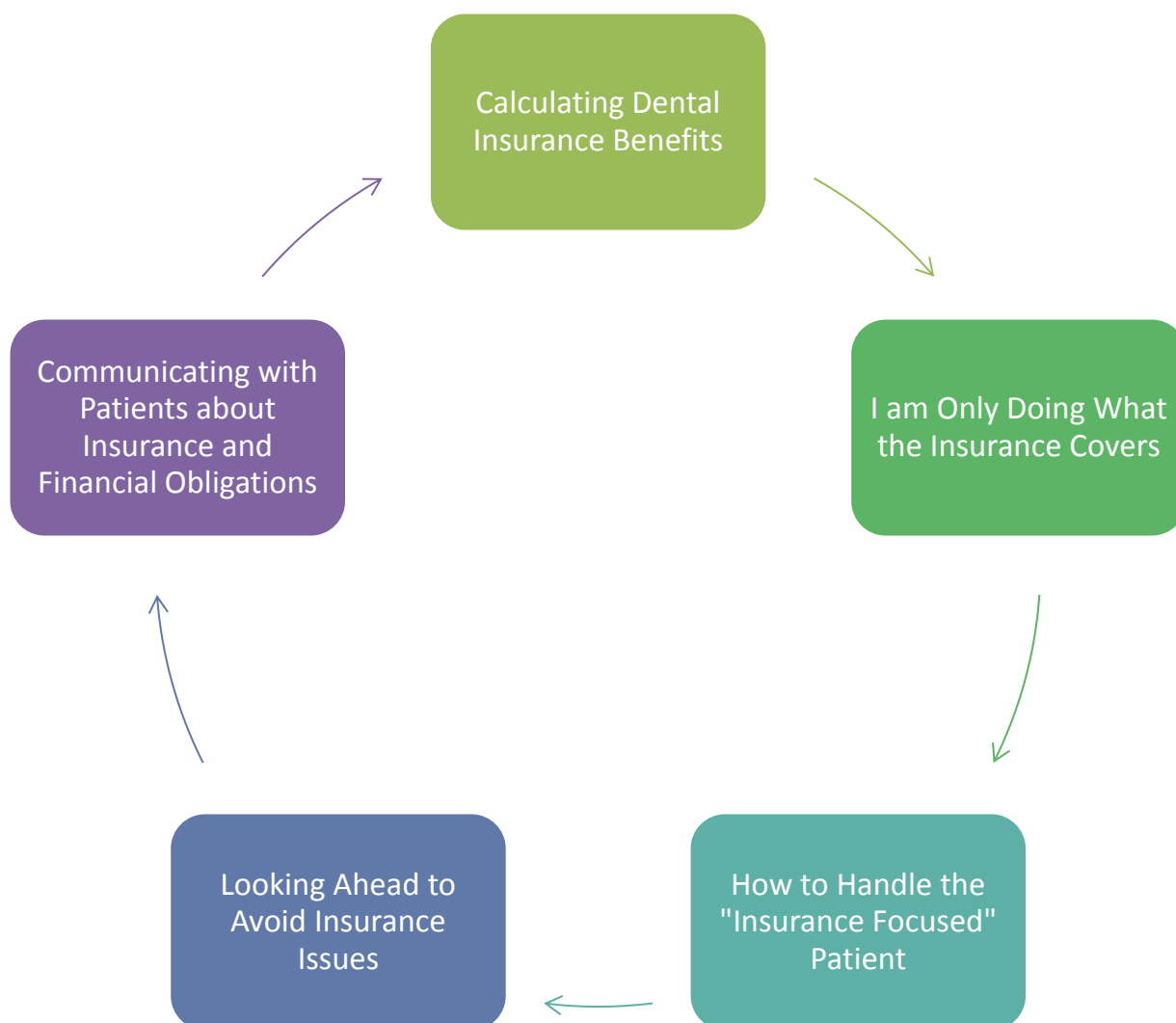
Front Office Rocks recommends that you complete **Patients Need to Understand Their Treatment Plan** and **Why Front Desk Consults Don't Work** first. Then, finish the series with **Case Acceptance Interview with Doctors** and **Post Op Calls** to build on your understanding of the importance of patient acceptance of treatment, case acceptance from the doctor's perspective and how to make post op calls after treatment is complete.



Insurance Discussion

This series delves into the insurance questions you face on a day to day basis. Before a patient accepts treatment, they will typically defer to “only what insurance covers” and this becomes a barrier to scheduling treatment. The videos in this series work through insurance issues and questions one by one, including calculating benefits, handling “insurance focused” patients, and looking ahead to prepare for insurance questions and issues.

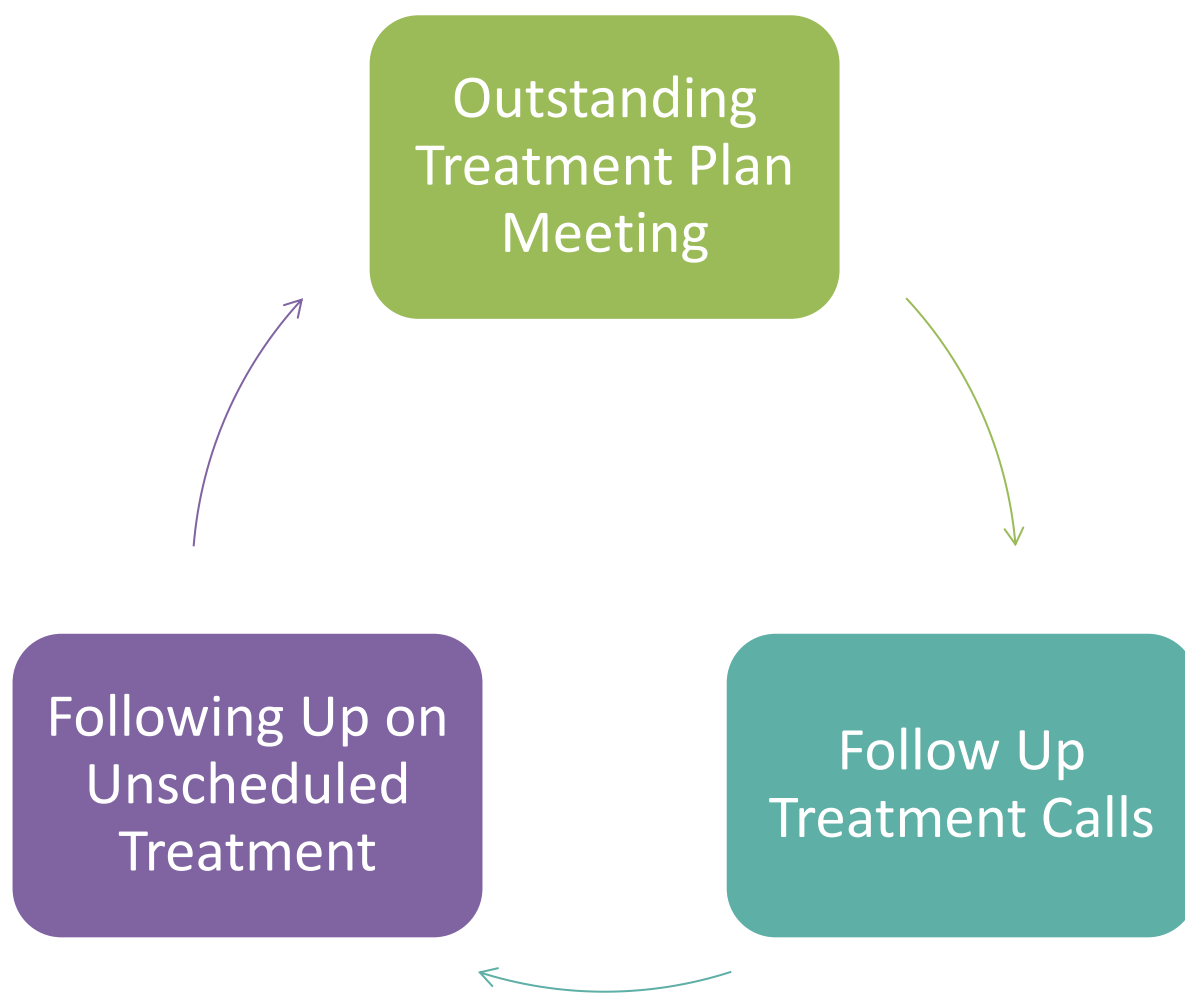
Front Office Rocks recommends that you complete **Calculating Dental Insurance Benefits, I am Only Doing What the Insurance Covers** and **How to Handle the “Insurance Focused” Patient** first to learn how to handle the most frequent insurance/patient topics in the office. Then, complete the series with **Looking Ahead to Avoid Insurance Issues** and **Communicating with Patients about Insurance and Financial Obligations** to gain insight into proper insurance preparation and communication about insurance with patients.



Unscheduled Treatment

This is the final series in the Treatment Coordinator Course and it focuses on managing unscheduled treatment in the office. Oftentimes and for various reasons, patients do not schedule their prescribed treatment the day of the consultation. However, with a policy in place, a plan to follow and persistence, you can successfully follow up with patients who have outstanding treatment plans to ensure they schedule. The videos in this series teach you how to prepare for an outstanding treatment meeting and what steps to take to follow up with unscheduled patients.

Front Office Rocks recommends that you complete **Outstanding Treatment Plan Meeting** and **Follow Up Treatment Calls** first, followed by **Following Up on Unscheduled Treatment** to complete the series.



RESOURCES

Available Treatment Coordinator Policies

Verbal Skills to Confirm Patient Payment
Payment Agreement Form
Treatment Plan Follow Up Policy
Next Day Reviewer
Old Patient Returns With Outstanding Treatment
Letter and Email Samples to Send to Patients

Cross-Training Video Suggestions for Scheduling

Receptionist


- Phone Training
- Excellent Telephone Skills
- Lunches and Phone Coverage
- Getting New Patients Scheduled in 48 Hours
- How to Hand Off Clients
- Asking for Referrals

Scheduling

- What is Block Scheduling
- Know Your Scheduling Policy
- Cancellation Phone Calls
- Confirmation Calls
- Next Day Reviewer
- How to Offer an Appointment
- Confirming Suggestions and Resources

Cross-Training Video Suggestions for Scheduling (continued)

**Financial
Coordinator**

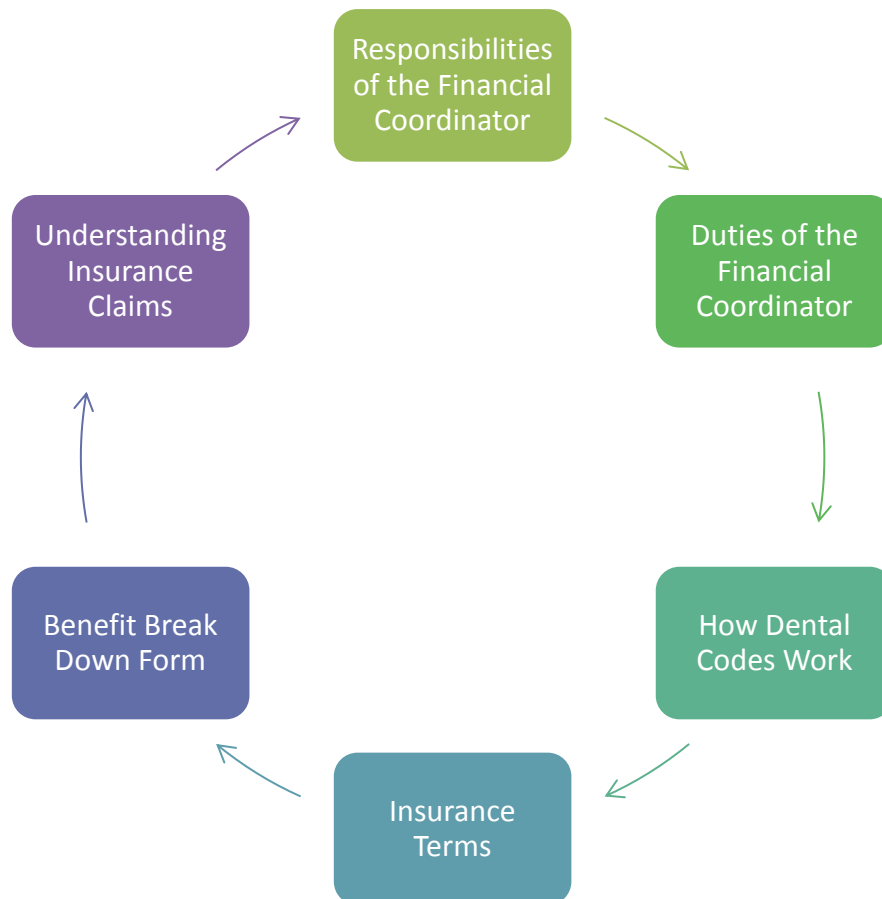
- 
- How Dental Codes Work
 - Insurance Terms
 - Coverage Book
 - Explaining Balance to Patient
-

FINANCIAL COORDINATOR

Understanding Insurance

This is the first of six in the Financial Coordinator series. Here, we will take a close look at insurance specifics, such as dental codes, insurance terms and insurance claims. We will also go into detail about the responsibilities and duties associated with the Financial Coordinator role and its importance to insurance in your office. The videos in this series closely examine the foundation of understanding insurance codes, terms, and claims, as well as how to work with insurance companies to garner the most information you can regarding patient benefits.

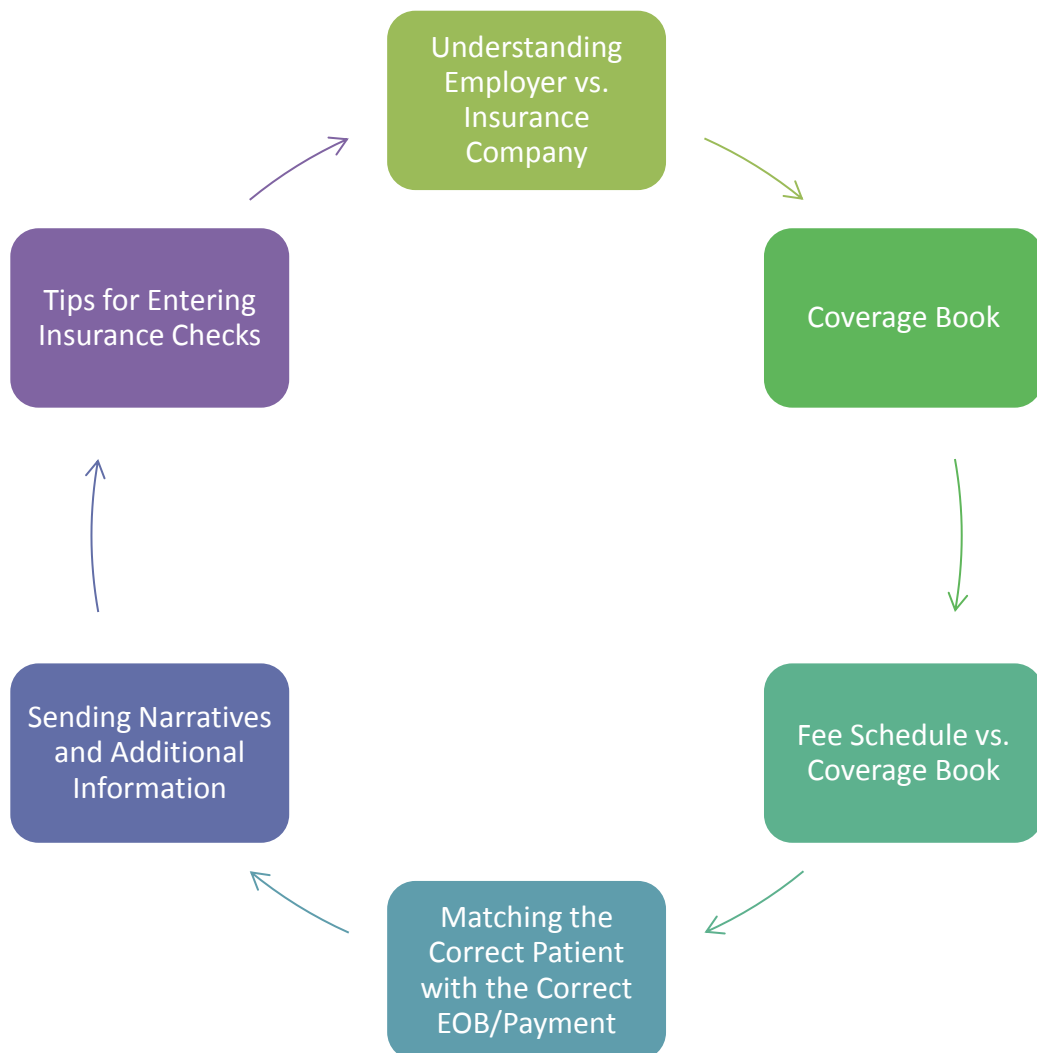
Front Office Rocks recommends that you complete **Responsibilities of the Financial Coordinator** and **Duties of the Financial Coordinator** first to develop a better understanding of the role and how to manage your day successfully. Then, complete **How Dental Codes Work**, **Insurance Terms** and **Benefit Break Down Form** to learn the importance of dental codes, how to decipher them, define vital insurance terms and how to use the benefit break down form. Finally, finish the series with **Understanding Insurance Claims** and take a closer look at how claims are processed and the impact it has on your office.



Dealing with Insurance

This is the second series in the Financial Coordinator course. In this series, we will go further into how to deal with insurance situations in your office, such as entering insurance information for patients, the coverage book, fee schedules and Explanations of Benefits (EOBs). Here we go into more detail about your role in the accuracy of patient insurance information. The videos in this series develop your understanding and skills as you learn to deal directly and indirectly with insurance companies.

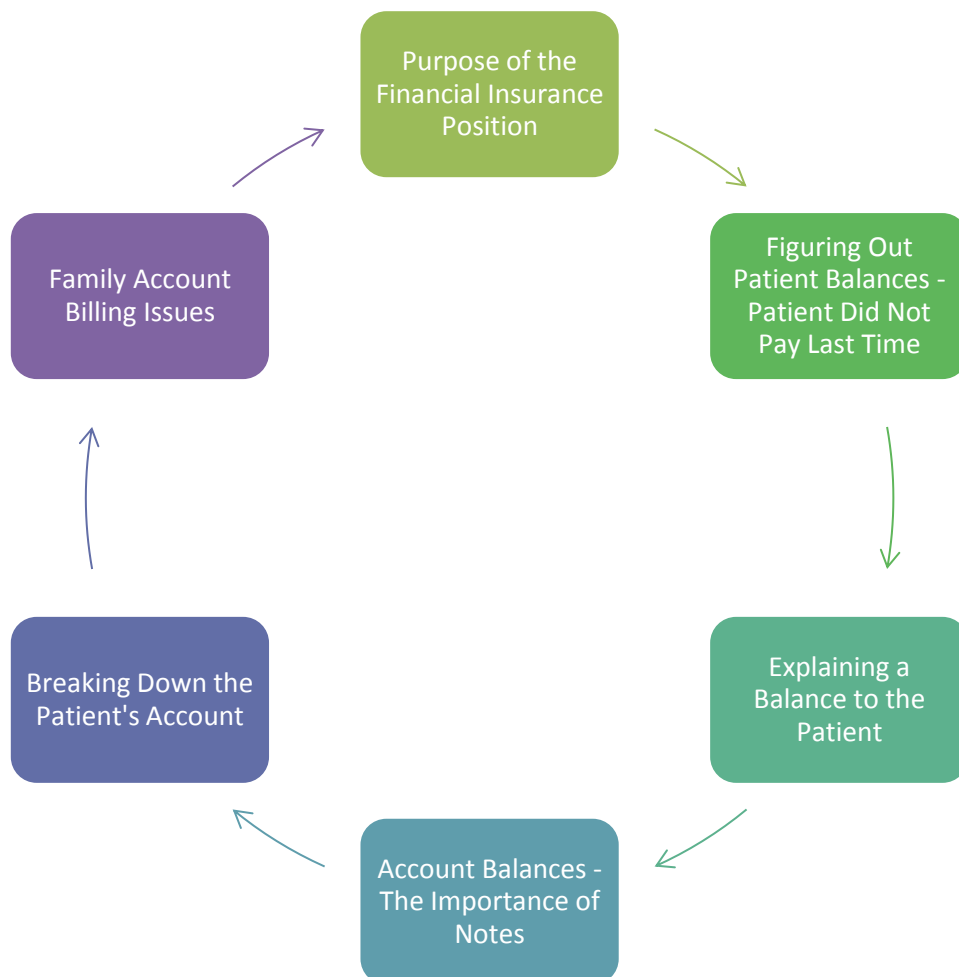
Front Office Rocks recommends that you complete **Understanding Employer versus Insurance Company, Coverage Book, and Fee Schedule versus Coverage Book** first to distinguish the difference between each of these vital pieces of the insurance puzzle. Then, complete **Matching the Correct Patient with the Correct EOB/Payment, Sending Narratives and Additional Information, and Tips for Entering Insurance Checks** to learn the steps you should take when you receive EOBs, insurance payments and claims questions.



Patient Accounts

This is the third series in the Financial Coordinator course. In this series, we look specifically at the patient and their account with the office. In your role as Financial Coordinator, you will work actively with the patients in your practice to help them understand their financial obligations and it is important to refine your communication skills. Here, we go into more detail about your role in figuring out patient balances, balancing patient accounts, family accounts and explanations to the patient. The videos in this series develop your knowledge and skills as you learn to deal directly with patients and their accounts.

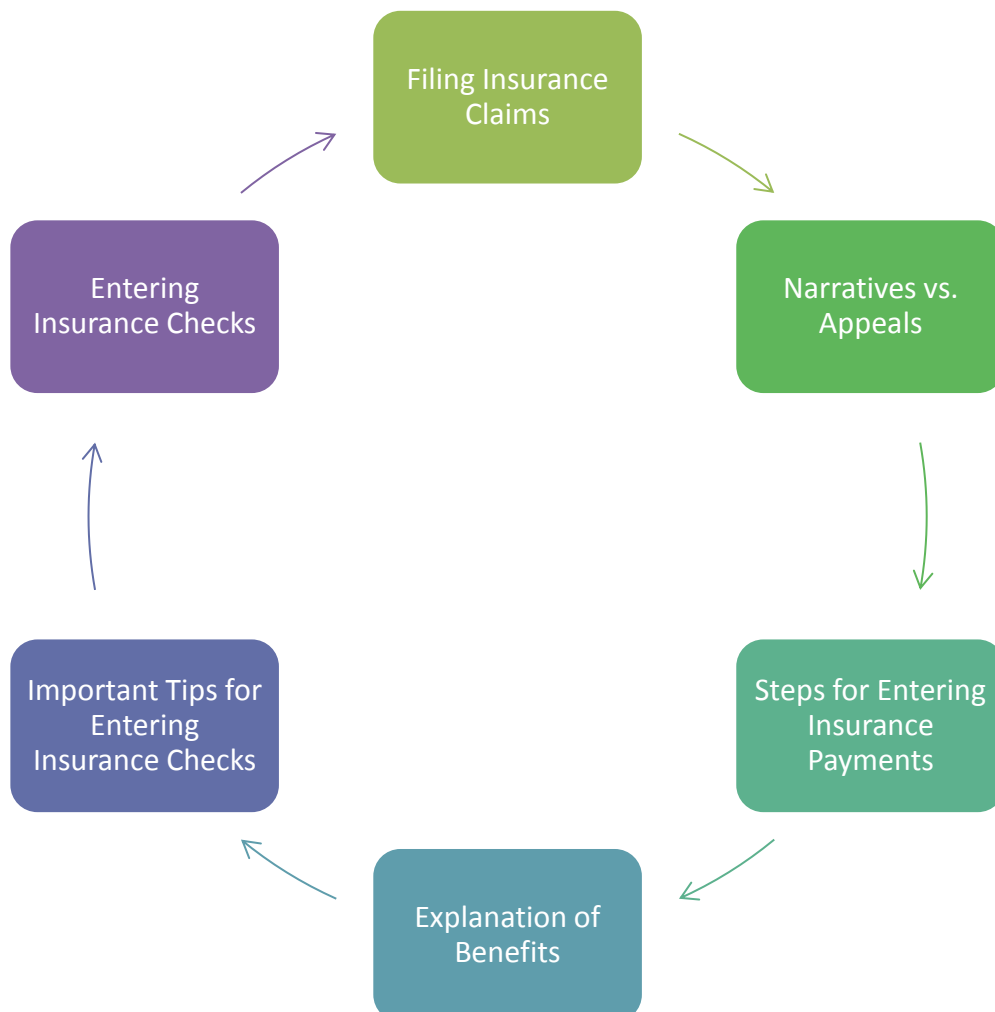
Front Office Rocks recommends that you complete **Purpose of the Financial Insurance Position** first to identify the expectations of the role in more detail. Next, complete **Figuring Out Patient Balances – Patient Did Not Pay Last Time, Explaining a Balance to the Patient, Account Balances – The Importance of Notes**, and **Breaking Down the Patient's Account** to breakdown the parts of a patient's account and how to address account issues. Finally, complete **Family Account Billing Issues** to learn the specific account needs of a family set up in your system.



Billing Insurance

In this fourth series in the Financial Coordinator course, we demonstrate how to bill the insurance company. As you continue to hone your financial skills, insurance billing must be addressed. Here, we go into more detail about your role in filing claims, claim narratives versus appeals, Explanation of Benefits (EOBs) and entering insurance checks that you receive. The videos in this series develop your ability to expertly manage the entire insurance claim process from submission to receipt of payment, including important tips for entering insurance checks into your accounting system.

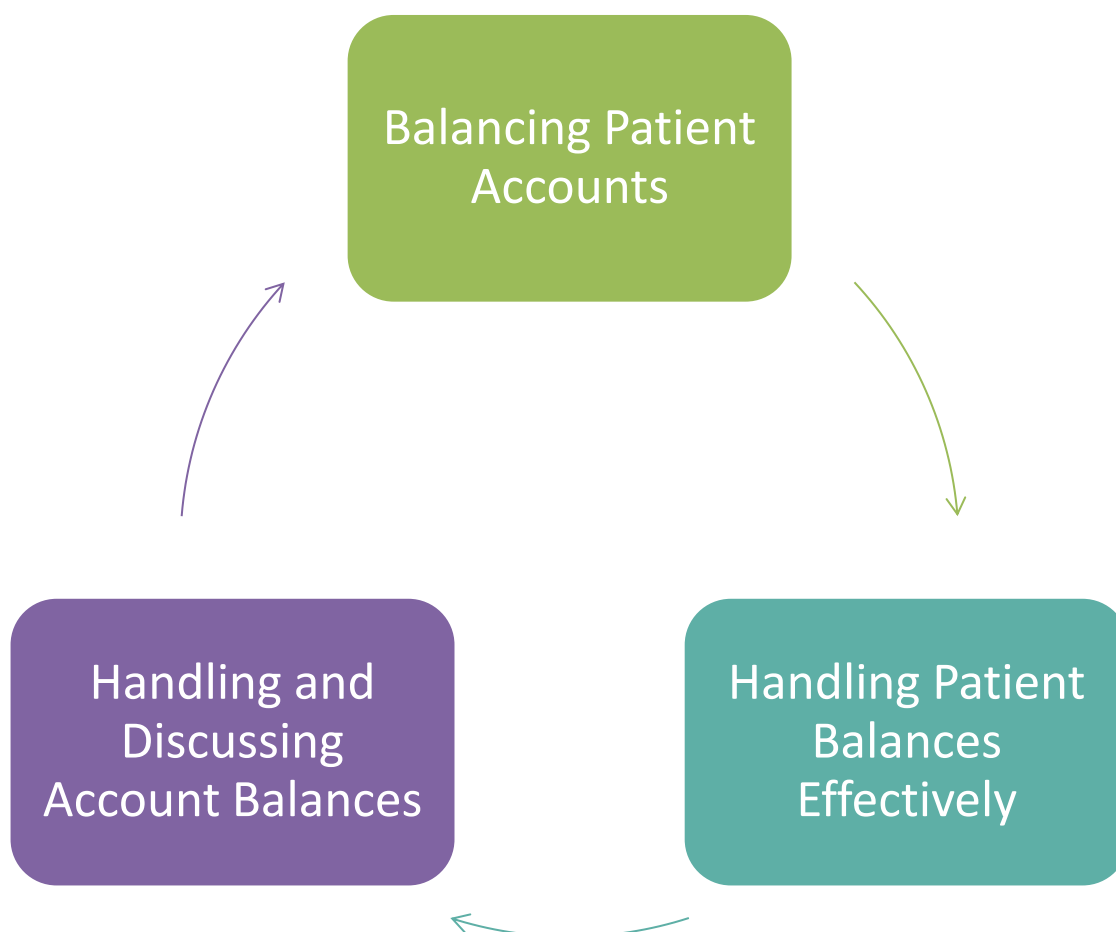
Front Office Rocks recommends that you complete **Filing Insurance Claims** and **Narratives versus Appeals** first to understand how to file a claim and what documentation is needed before it is ready to submit. Next, complete **Steps for Entering Insurance Payments**, **Explanation of Benefits**, **Important Tips for Entering Insurance Checks**, and **Entering Insurance Checks** to break down the steps and detailed process of applying insurance payments directly to the patient account.



Billing Patients

This is the fifth series in the Financial Coordinator course and in this series we discuss how to handle patient accounts. Your role in managing patient accounts is an important one and your ability to communicate effectively with patients about their financial obligation to the practice is vital. Although talking with patients about money can be difficult, here we will provide you with the tools you need to be properly prepared and to set the tone for the conversation. The videos in this series address how to balance and discuss patient accounts and answer patient questions with ease.

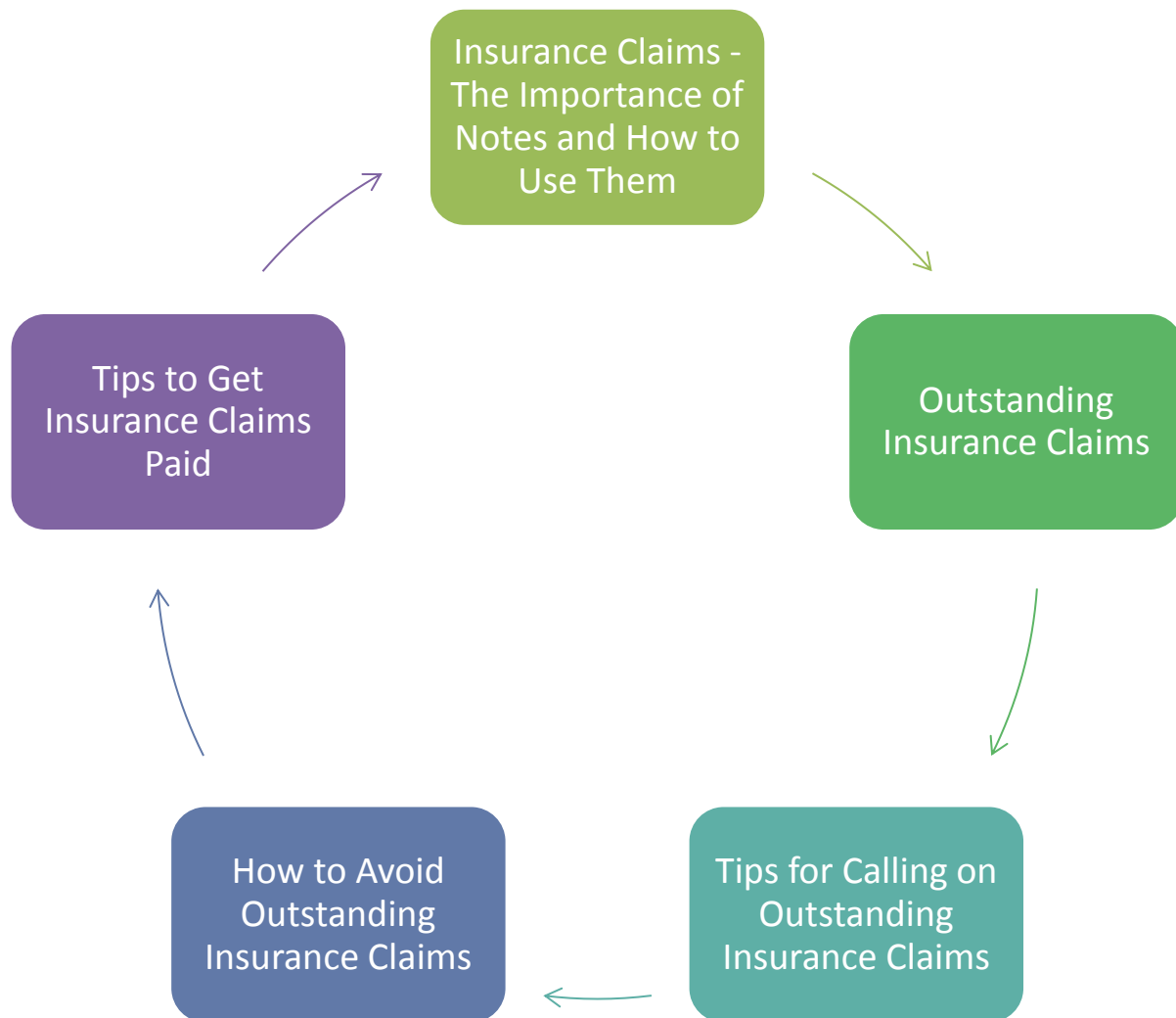
Front Office Rocks recommends that you complete this series in the following order **Balancing Patient Accounts**, **Handling Patient Balances Effectively**, and **Handling and Discussing Account Balances**.



Outstanding Insurance

This is the sixth and final series in the Financial Coordinator course and in this series we discuss addressing outstanding or overdue insurance claims. Though it is probably one of the more tedious tasks in the office, calling on overdue insurance claims is also one of the most important. You have a significant role in pursuing and avoiding a claim backlog. In order to successfully navigate outstanding claims, the videos in this series teach you how to call insurance companies, get claims paid and how to avoid overdue claims in the future.

Front Office Rocks recommends that you complete this series in the following order **Insurance Claims – The Importance of Notes and How to Use Them**, **Outstanding Insurance Claims**, and **Tips for Calling on Outstanding Insurance Claims** first. Next, complete **How to Avoid Outstanding Insurance Claims** and **Tips to Get Insurance Claims Paid** to learn the best approach to getting paid and avoiding future overdue claims.



RESOURCES

Available Financial Coordinator Policies

Calling on Outstanding Insurance
Collecting Balances Policy
Financial Coordinator Checklist
Narratives Required by Insurance Companies
Out of Network Letter to Patients
Calling on Outstanding Insurance
Insurance Information Found & Noted
Insurance Downgrade Work Around
Financial Coordinator Monthly Tasks
Patient Account Alert Examples
Financial Coordinator Job Duties in Depth
8 Hour Day Outline Financial Insurance Coordinator

Available Financial Coordinator Lesson Documents

How Dental Code Works
Insurance Terms
Explanation of Benefits
Understanding Insurance Claims
Benefit Breakdown Form
Understanding Employer versus Insurance Company
Figuring Out Patient Balances – Patient Did Not Pay Last Time
Fee Schedule versus Coverage Book

Cross-Training Video Suggestions for Financial Coordinator

Receptionist

- Phone Training
 - Excellent Telephone Skills
 - Lunches and Phone Coverage
 - Getting New Patients Scheduled in 48 Hours
 - How to Hand Off Clients
 - Asking for Referrals
-

Cross-Training Video Suggestions for Financial Coordinator (continued)

Scheduling

- What is Block Scheduling
- Know Your Scheduling Policy
- Cancellation Phone Calls
- Confirmation Calls
- Next Day Reviewer
- How to Offer an Appointment
- Confirming Suggestions and Resources

**Treatment
Coordinator**

- Asking the Patient to Pay
 - Being Prepared to Collect a Patient Balance
 - Calculating Dental Insurance Benefits
 - Looking Ahead to Avoid Insurance Issues
 - Outstanding Treatment Plan Meeting
-

OFFICE MANAGER

Manager Job Duties

This is the first video series in the Office Manager course and in this series we take a closer look at your role and responsibilities in the office. You likely have a significant role in hiring new staff and the videos in this series walk you through the entire hiring process from writing the job advertisement to the employee's first week on the job.

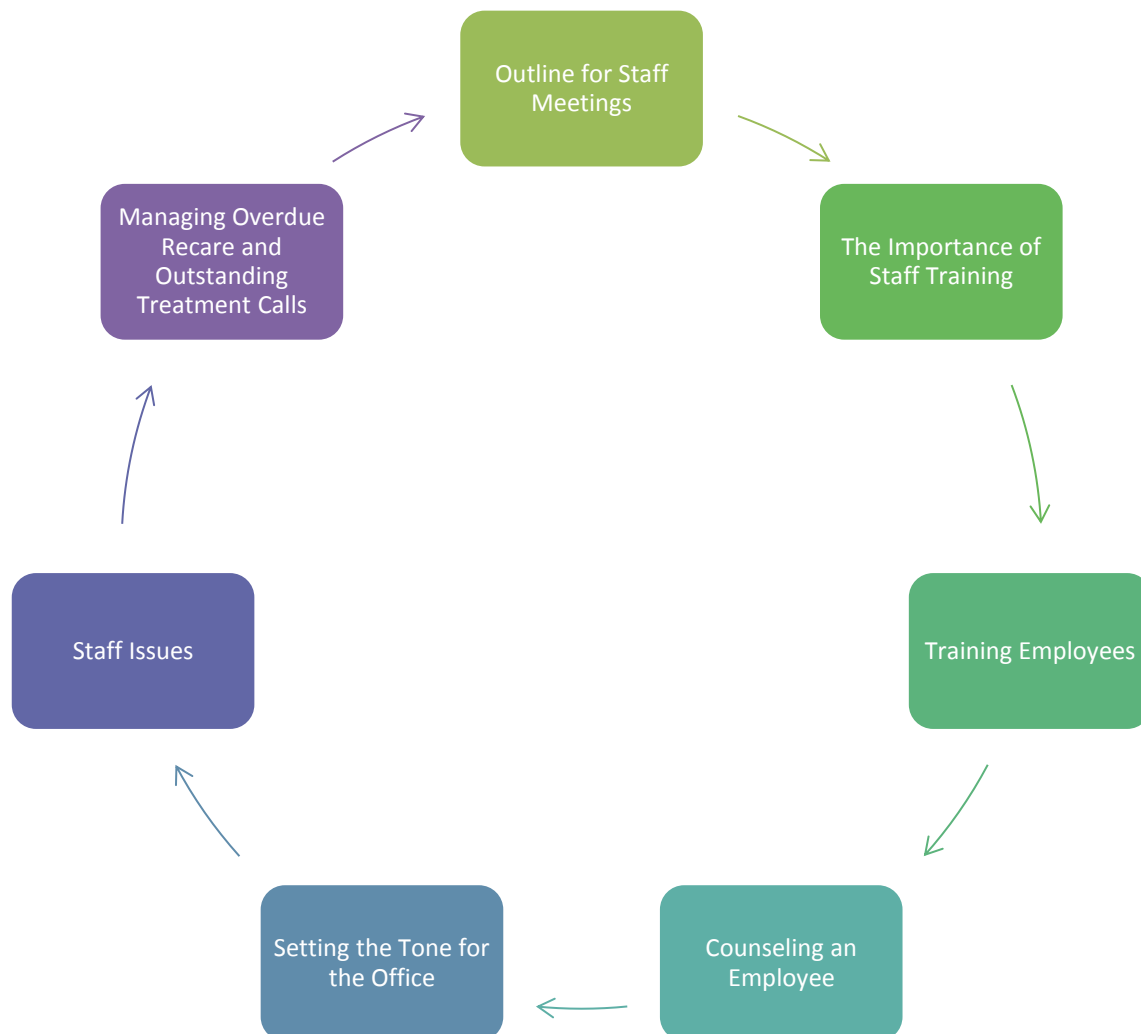
Front Office Rocks recommends that you complete this series with **Office Manager Responsibilities** first. Next, complete **Writing a Good Job Advertisement**, **Reading Resumes**, **Phone Interview**, **Interviewing**, and **Interview Management Style** which will assist you in navigating the hiring process. Finally, complete **First Week on the Job** to prepare for your new employee's arrival and ensure their success in their new position on your team.



Staff Management

This is the second video series in the Office Manager course and in this series we demonstrate how to manage your staff in various situations. As the Office Manager, you will be expected to address a multitude of issues ranging from counseling an employee to managing overdue recare and outstanding treatment calls. In addition, you are expected to set the tone for the office and ensuring your staff is well trained. In this video series, we provide a detailed overview on each of these topics and a few others to help you create a productive and positive atmosphere in the office.

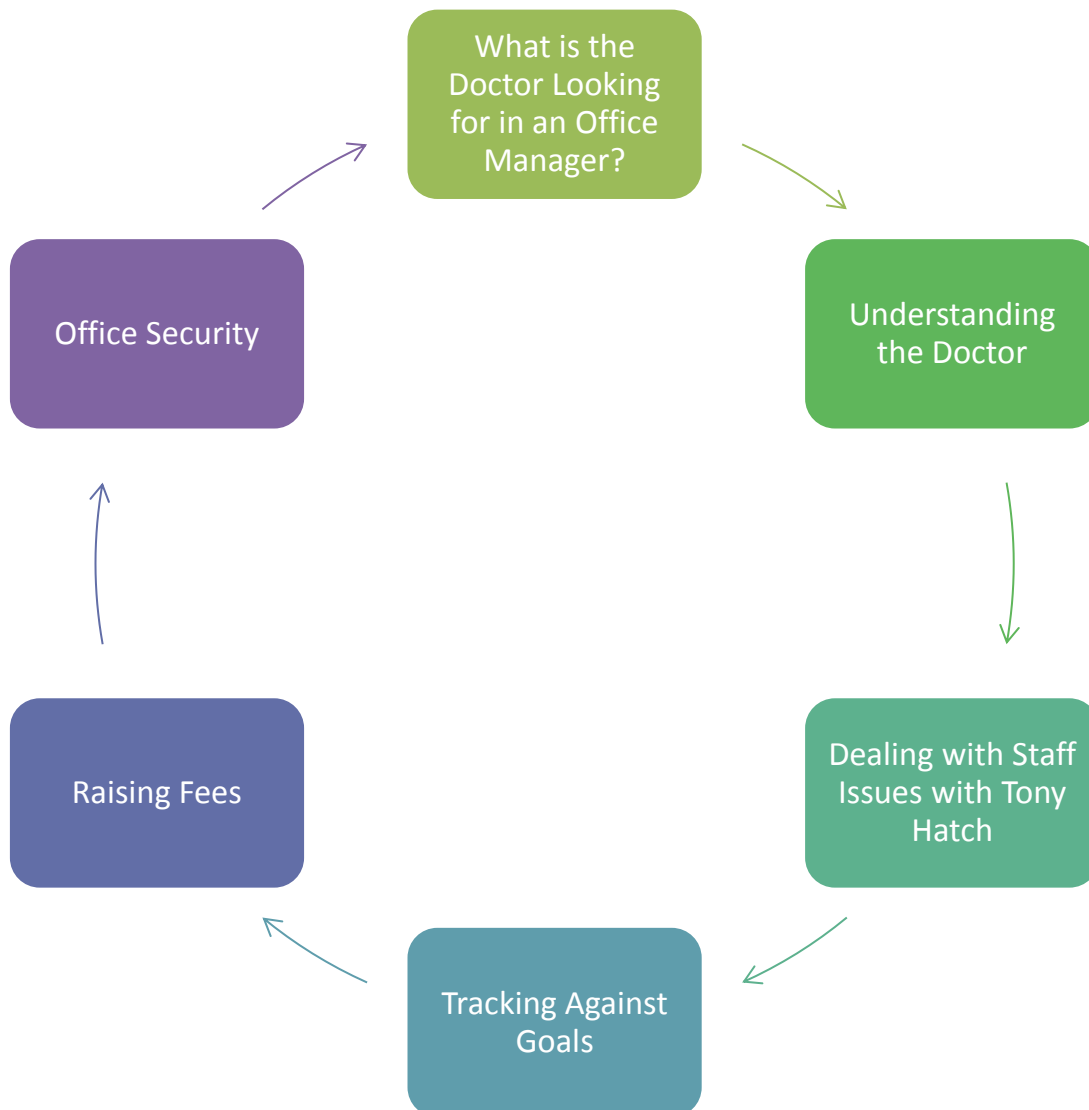
Front Office Rocks recommends that you begin this series by completing **Outline for Staff Meetings**, **The Importance of Staff Training**, and **Training Employees** first. Next, complete **Counseling an Employee**, **Setting the Tone for the Office**, and **Staff Issues** which will prepare you to deal directly with employee issues, as they arise. Finally, view **Managing Overdue Recare & Outstanding Treatment Calls** to complete your Staff Management training.



Doctor Expectations

This is the third video series in the Office Manager course and in this series we address the doctor(s) expectations of you and what he or she is looking for in an Office Manager. In this video series, we look at the specific functions you manage in your office and how they pertain to the doctor(s) expectations, such as daily and monthly financial goals, practice fees and office security.

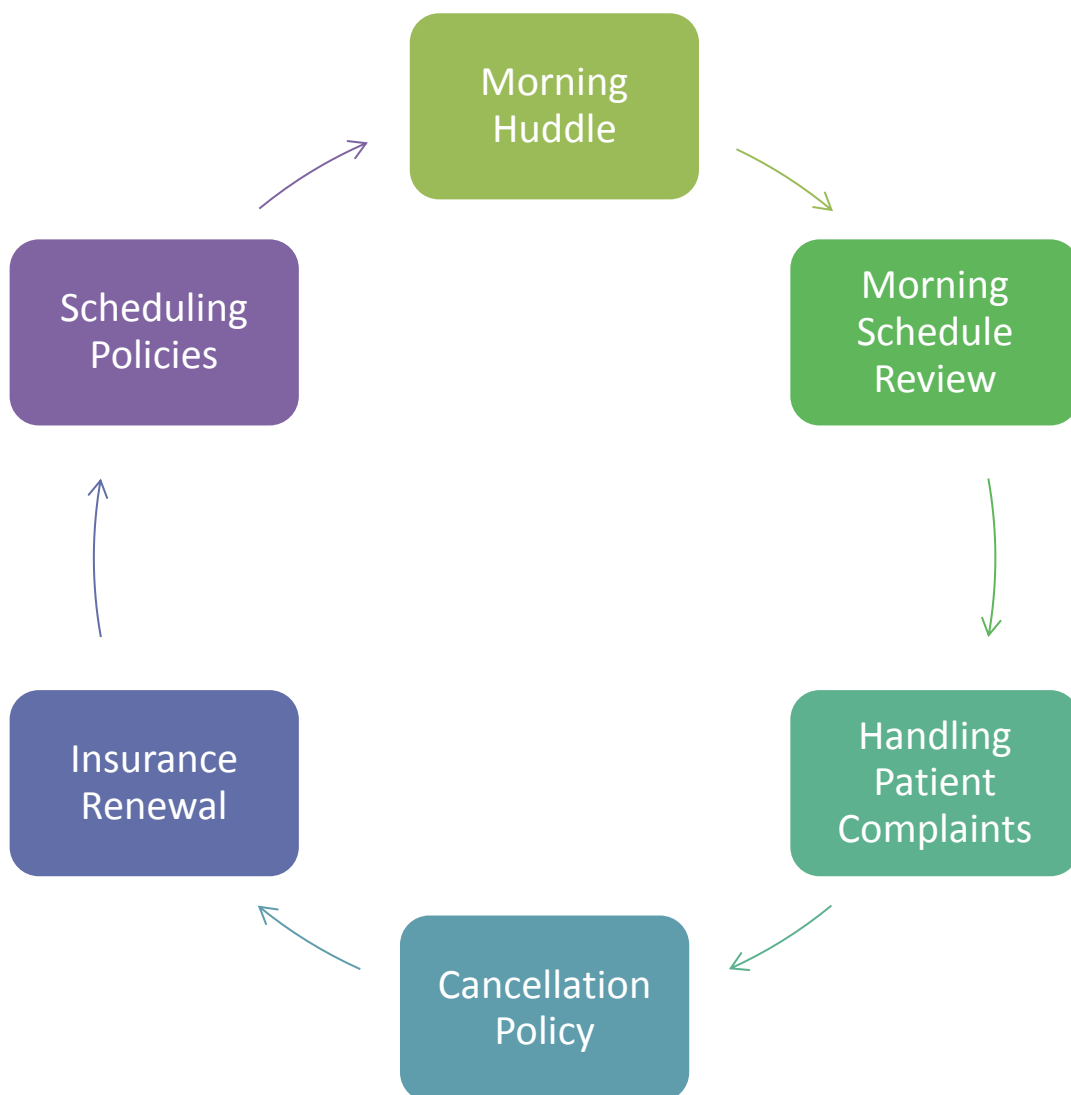
Front Office Rocks recommends that you begin this series by completing **What is the Doctor Looking for in an Office Manager** and **Understanding the Doctor** first. Next, complete **Dealing with Staff Issues with Tony Hatch**, **Tracking Against Goals**, and **Raising Fees** to gain a better understanding of specific priorities of the daily operations. Finally, complete **Office Security** to take a closer look at how you can keep your office and financial information safe and secure at all times.



Patient Control

This is the fourth video series in the Office Manager course and in this series we identify successful patient control methods, including how to run a morning huddle and morning schedule review. In order to provide the ultimate customer service experience in your office to your patients, you must plan ahead. In this video series, we walk through how to plan and prepare for your patients and the day ahead and address specific patient driven policies, such as cancellation and scheduling.

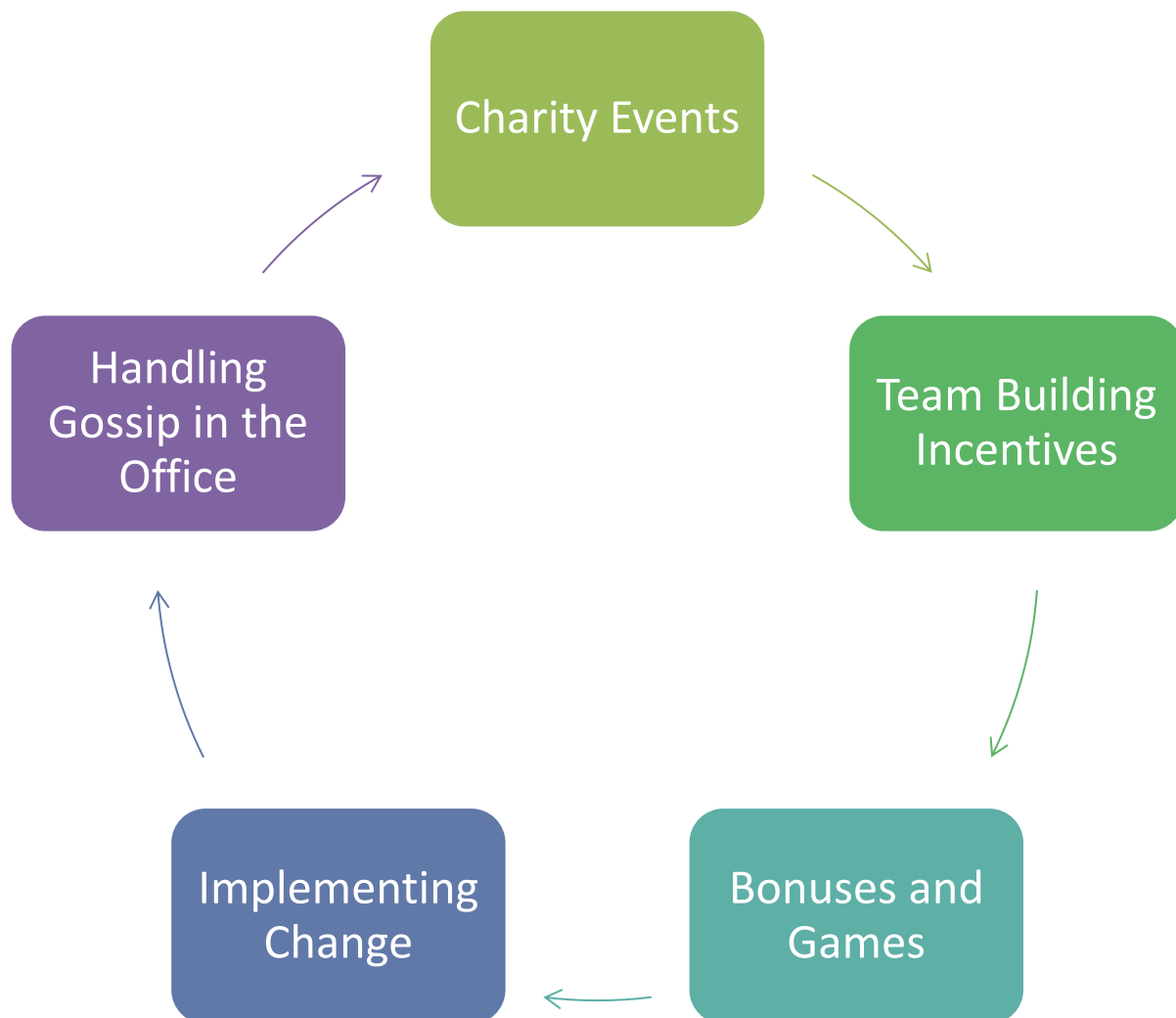
Front Office Rocks recommends that you begin this series by completing **Morning Huddle** and **Morning Schedule Review** first to learn how to get the day started in the right way. Next, complete **Handling Patient Complaints**, **Cancellation Policy**, **Insurance Renewal**, and **Scheduling Policies** to look closer at specific patient and policy needs in the practice.



Team Building

This is the final video series in the Office Manager course and in this series we look at developing an optimistic workplace through team building and managing in office gossip. It is important that the office atmosphere is productive and conducive to creating a positive experience for your patients. In this video series, we discuss how to team build, give examples of events, bonuses and games and teach you how to manage change and gossip in your office.

Front Office Rocks recommends that you begin this series by completing **Charity Events**, **Team Building Incentives**, and **Bonuses and Games** first to introduce yourself to various types of team building activities. Then, complete **Implementing Change** and **Handling Gossip in the Office** to look closer at change and gossip impact the office and how to manage both in a positive way.



RESOURCES

Available Office Manager Policies

Meeting Policy
Auto Note Examples
New Associate Guidelines
Office Noise Policy
Out of Network Letter to Patients
Weekly Executive Meeting
Morning Huddle Form
Supplies Ordering Policy
Overtime Pay Outline
Requesting Vacation & Time Off
Headset Outline
Office Manager Checklist

Available Office Manager Lesson Documents

Schedule Overview for a Productive Day
Tracking Against Goals
Patient Control Morning Schedule Review
Examples of Dismissal Verbiage
Scheduling Policy Points

Cross-Training Video Suggestions for Office Manager

For the Office Manager, we suggest entire subcategories of training versus individual videos.

Receptionist

- 
- Reception Organizations & Management
 - Customer Service
 - New Patient Calls
 - New Patient Appointment
-

Cross-Training Video Suggestions for Office Manager (continued)


Scheduling

- 
- How to Get Patients to Schedule
 - How to Handle Cancellations
 - Doctor Schedule
 - Hygiene Schedule

**Treatment
Coordinator**

- 
- Consultations
 - Discussing Money
 - Insurance Discussion
 - Unscheduled Treatment

**Financial
Coordinator**

- 
- Patient Accounts
 - Billing Insurance
 - Billing Patients
-