

# Customized SOP Manual



A Dynamic SOP Manual and over 100  
Supporting Forms for Best Practices  
Customized for your Practice Type.



## Why?

Are you growing more and more frustrated trying to find the right form or understanding exactly how a procedure should be set up? As management have you heard "I didn't know that was my job"? If trying to manage your company's work instructions, SOPs, and training documents is a job within itself, You're not alone. What started out as creating the perfect supporting documents for our clients has now manifested into a full blown Standard Operating Procedure Manual, complete with over 100 supporting forms, letters and documents. Our manual houses all your individual SOPs in one easy to use online guide.

## **Our SOP Manual includes but is not limited to the following categories:**

- Ownership
- Administrative with HR for hiring, onboarding, training and conflict management
- Business Team specific to call maintenance, scheduling, financial and insurance
- Clinical Team to include sterilization, room set up and tear down, procedure details, equipment and supplies
- Hygiene Team with verbal skills, soft tissue management education and scheduling
- Manual includes bonus sections on Marketing and Verbal Skills for the team
- In addition, there are 100+ supporting forms that come with the manual for your use and customization

# Customized SOP Manual



## OWNERSHIP SOPS

Our Ownership SOP Section sets the tone for the practice and lays out the foundation of the practice philosophy.

**Standard Operating Procedures**

**Key Performance Indicators Tracking**

Key Performance Indicators will be monitored in our office to assist us in tracking our business growth, our success, and our overall performance.

The office manager will be the owner.

**Daily**

The following will be reported:

- Day end sheet.
- Deposit slip.
- Petty cash settlements.

**Weekly**

The following will be reported:

- Weekly production and collections.
- Open, unscheduled hygienists.

**Monthly**

The following metrics will be reported:

- Gross and net production.
- Adjustments.
- Gross and net collections.
- Year over year growth.
- Month over month growth.
- Provider production for each provider.
- New patient exams and procedures.

**OWNER STANDARD OPERATING PROCEDURES**

**Mission and Vision Statements**

**General Definition**

**Mission Statement**

A written statement of an office's core purpose and focus that normally remains unchanged over time. Properly crafted mission statements:

- Serve as filters to separate what is important from what is not.
- Clearly states which patient base will be served and how.
- Communicates a sense of intended direction to the office.

A mission is something to be accomplished, whereas a vision is something to be pursued for that accomplishment.

**Vision Statement**

An aspirational description of what an office would like to achieve or accomplish in the mid-term or long-term future. It is intended to serve as a clear guide for choosing current and future courses of action.

**Our Office's Mission and Vision Statement**

**Mission Statement**

INSERT TEXT

**Vision Statement**

INSERT TEXT

**Legal Human Resources Manual**

Our legal Human Resources Manual is created and maintained by INSERT TEXT. All state laws, employment laws, and Human Resources compliancy will be stored in this manual.

The Human Resources Manual for our office can be found in INSERT TEXT.

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# Customized SOP Manual



## HR/ADMIN

The HR/ADMIN section of the manual is designed to the Standard Operating Procedures for the area of the practices that manages the team. In addition, it sets the procedures for onboarding each team member.

**Requesting Time Off**

Employees should fill out the "ABSENCE REQUEST" Form at a minimum of four (4) weeks prior to desired time.

These forms can be found

Once the form is filled out, it should be submitted to the Office Manager.

**Bonus System**

Our goal for our business is to experience continued growth and success year after year. Each year the owner/leadership team will review and discover growth from the previous year and expenses projection for the coming year. Once our expenses are calculated, goals will be put into place. Our leaders are happy to offer our team a comprehensive bonus system. Each team member will have a role in our office and business growth; therefore, each team member will be included in this bonus system.

**Bonus System Details**

**INSERT TEXT**

**Employee Evaluations**

Each year on the employee's anniversary an annual evaluation will take place with the practice owner. The purposes of the annual performance evaluation process are to promote communication and provide useful feedback about job performance, to facilitate better working relationships, to provide an historical record of performance, and to contribute to professional development. This evaluation will not be a discussion of wage increases; this process is about employee development and goals.

This is a three (3) step process.

1. Employee will complete the self-evaluation two (2) weeks prior to evaluation date and give it to their supervisor.
2. Supervision will review self-evaluation and complete the employees full review.
3. The employee and supervisor will meet to discuss the evaluation.

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## HR/ADMIN

In addition, it sets the procedures for onboarding each team member.

Standard Operating Procedures >

**Social Networks and Blogging**

Internet based communication networks both business and social, are used for many purposes. If employees are employees must first obtain practice time. If approval information on any of these

- Confidentiality police
- Personal blogging or equipment.
- Practice Information
- Defamatory, threaten
- Disparaging comme competitors must not
- The practice logo or consent has been ob
- Patient information s
- Employees need to sites are accessible fully aware of the unprofessional and c
- If employees join bu only post information
- Employees are expe of the information. disciplinary action or

Standard Operating Procedures >

**New Employee Onboarding**

Utilize the below outline to onboard new employees. The form can be found and printed out in the supporting forms directory. Please fill out form and keep a copy of the completed form in the employee's personnel file.

**Supporting Form: [\(HR\\_General\\_Onboarding\)](#)**

**General Onboarding Plan**

**Summary**

This checklist is designed so that a new team member will have successfully been trained on all items required. The estimated time to complete this training is thirty (30) days.

**Directions**

A working copy of this document is to be kept in the team members file. After each section is completed, it should be marked as complete. Form can be found with supporting documents for the Standard Operating Procedures Manual.

**Week 1 – Getting to Know You**

The purpose of this week is to have all employment documentation in place, configure all equipment, and obtain enough training in our internal systems so that they can learn how to apply these technologies in the field.

Item	Date Complete	Sign Off
<b><u>New Hire Documentation</u></b> <ul style="list-style-type: none"> <li>• Employment at will and direct deposit information.</li> <li>• I-9 and W4 with supporting documentation.</li> <li>• Employee handbook, vision and values reviewed.</li> <li>• Signed copy of job description.</li> <li>• Employee photo taken and added to file.</li> </ul>		

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## BUSINESS TEAM

The Business Section of the manual covers all aspects of running a successful dental practice including necessary forms and verbal skills.

**INSURANCE STA**

**General Insurance**

The mission of our compassionate team is to support patients while supporting their insurance and treatment.

We will partner with your insurance company to file claims with all the benefits, as well as we will fight for our patients when their insurance drive.

**Setting up Insurance**

Entering the insurance information and calculations correctly. The sequence is below:

Enter the following in order:

- Employer. See...
- Insurance company
  - Search for...
  - If they have an information automated...
  - If the company...
  - ✓ In...
  - ✓ G...
  - ✓ F...
  - ✓ P...

Standard Operating Procedures >

**Continuing care list.**

- Doc...

Standard Operating Procedures >

**No Shows and C**

Our goal is for all patients to show up for their appointment. While this is not always the case, it is the responsibility of the hygiene team if necessary.

**When the Patient**

When a patient calls to reschedule or to keep their appointment. If it is necessary to work with them to reschedule, the hygiene team if necessary.

**When the Patient**

Call the patient with the correct date and time.

If you must leave a message:

"Hi Mr./Ms. **DOCTOR'S** office. This is [Name]. Please do not call back until we call you back.

If you speak with the patient:

"Hi Mr./Ms. **DOCTOR'S** office. This is [Name]. Please do not call back until we call you back.

Stop talking and let the patient know you will call them back.

If the patient is not available, reschedule them:

"INSERT PHONING HERE" - getting here unfortunately amount of appointment.

Standard Operating Procedures >

**SCHEDULING STANDARD OPERATING PROCEDURES**

**Scheduling General Guidelines**

Each of our patients should be scheduled based on their needs, however, they should be placed based on the following guidelines:

**New Patients**

New patients should call. They should be scheduled for their appointment. If they call, they should be scheduled for the correct date and time.

Be sure to gather all the information for this section.

**Existing Patient**

The following steps should be followed:

**Verify They Are**

Some patients may not have their documentation. Verify that they are seeing the preferred provider.

If the patient is not available, schedule them accordingly.

Document the appointment.

**Correct Procedure**

Verify that procedure is correct for that appointment.

**Outstanding Tre**

Check for any outstanding treatment for everyone is prepared.

Standard Operating Procedures >

**Handling Petty Cash**

Petty cash will have \$**INSERT AMOUNT** to be used for small purchases and to accommodate change for cash paying patients. Receipts must be kept for all purchases.

Petty cash will be reconciled once a month using the "RECONCILIATION" Form. The form can be found on the network with all office forms.

**Supporting Form: (Business Petty Cash Fund Reconciliation)**

**Sample Form**

PETTY CASH FUND RECONCILIATION FORM

DATE SUBMITTED: \_\_\_\_\_ ISSUING OFFICE: "TO BE SCHEDULED AT OFFICE:" \_\_\_\_\_

DESCRIPTION	AMOUNT
Cash on hand	\$ _____
Receipts on hand	\$ _____
Total Cash and Receipts	\$ _____
Petty Cash Fund Original Balance	\$ _____
Difference	\$ _____

REASON FOR DIFFERENCE (if any): \_\_\_\_\_

INITIALS: \_\_\_\_\_

I, \_\_\_\_\_, Office Manager/Staff, have verified supporting receipts and documentation, and agree to the reconciliation results.

Business Team Member Signature: \_\_\_\_\_

Business Team Manager Signature: \_\_\_\_\_

Standard Operating Procedures >

**Patient Billing**

**Overview**

Patient copays and monies for services rendered are to be collected at time of service. Patient bills are sent on a regular basis to account for any monies not collected at time of service.

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## CLINICAL TEAM

The clinical section provides guidance for the clinical team in areas of patient communication, daily and weekly tasks, clinical skills and tray and room setup.

**CLINICAL TEAM STANDARD OPERATING PROCEDURES**

**Every Patient**

- GATHER
- Always deliver best in class **HAND OFF's** to your other team members.
- Link ref

**Proper**

**Daily, Weekly, Monthly**

The following are similar

**INSERT YOUR CUR**

**Daily**


- Open the clinic
- Turn all equip
- Prep ops for p
- Sterilize ops, i
- Complete pati
- Restock each
- Perform the cl

**Weekly**


- Wash, dry and
- pockets before
- Add oil to the
- Remove all ins
- Change soluti
- Ensure all inst
- Load and run
- Turn off the A

**X-Rays**


**Bitewing**



**Posterior (Upper)**



**Anterior**




**Intra Oral Can**

**Camera**

**INSERT PICTUR**

**Curing Light**



**Procedure**

**Assistant Applying Sealants (Office Specific customization)**

- Put in bite block.
- Put on dental clamp and then put on the rubber dam.
- Make sure area you are working on is isolated and dry (consider putting saliva ejector underneath the tongue).
- Etch (ten [10] seconds).
- Rinse and dry.
- Apply bond with purple fuzzy brush.
- Light cure (ten [10] seconds).
- Apply sealant and spread out the sealant with the ball burnisher on the pits and grooves (make sure there are no ledges or bubbles before curing).
- Light cure (forty [40] seconds, go occlusal and buccal).
- Check occlusal, buccal and lingual surfaces with the explorer for ledges or bubbles before removing the dental dam.
- Once sealants are complete, have doctor check them.
- Once sealants are completed, dismiss patient and write the clinical note.
- Clean operator after every patient (see SOP note for cleaning room).

**Assisting Doctors with Sealants and Buccals**

- Put in bite block.

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## *THE PROCESS*

### **SOP MANUAL WITH NO CUSTOMIZATION**

- When you purchase the manual without full customization we will:
  - Brand the manual with your logo and brand colors
  - Brand all 100+ forms with your logo
- You will have a full working manual to customize on your own

### **SOP MANUAL WITH FULL CUSTOMIZATION**

- When you purchase the manual with full customization we will:
  - Brand the manual with your logo and brand colors
  - Brand all 100+ forms with your logo
- A Practice Dynamics coach will work remotely with the team over a six-month period to review and customize the manual to fully match your office procedures.