Customized SOP Manual

PRACTICE
DYNAMICS

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

Why?

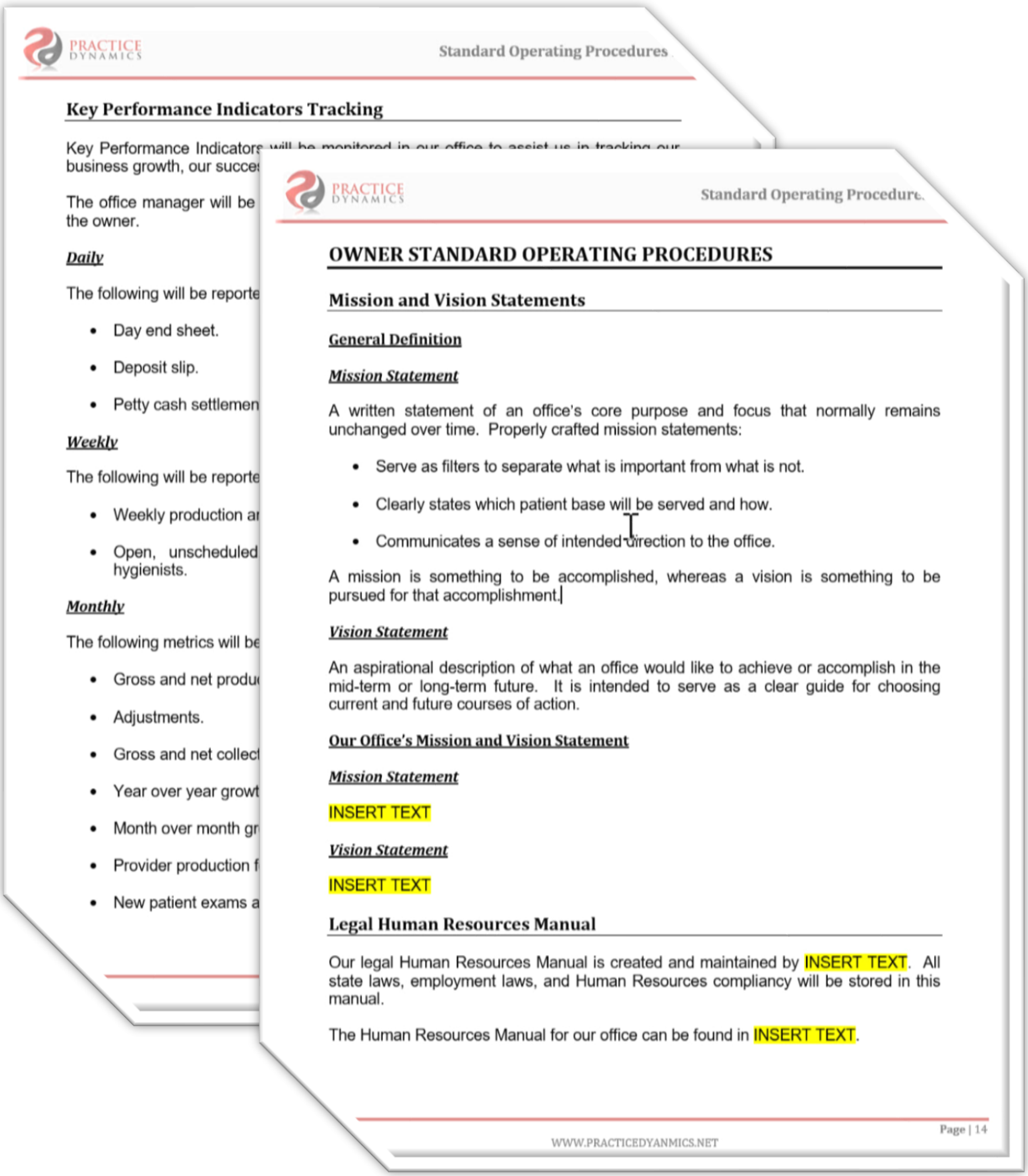
Are you growing more and more frustrated trying to find the right form or understanding exactly how a procedure should be set up? As management have you heard "I didn't know that was my job"? If trying to manage your company's work instructions, SOPs, and training documents is a job within itself, You're 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

OWNERSHIP SOPS

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


PRACTICE DYNAMICS 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 succe

The office manager will be the owner.

Daily

The following will be reporte

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

Weekly

The following will be reporte

- Weekly production a
- Open, unscheduled hygienists.

Monthly

The following metrics will be

- Gross and net produ
- Adjustments.
- Gross and net collec
- Year over year growt
- Month over month gr
- Provider production f
- New patient exams a

PRACTICE DYNAMICS Standard Operating Procedure

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.

Page | 14

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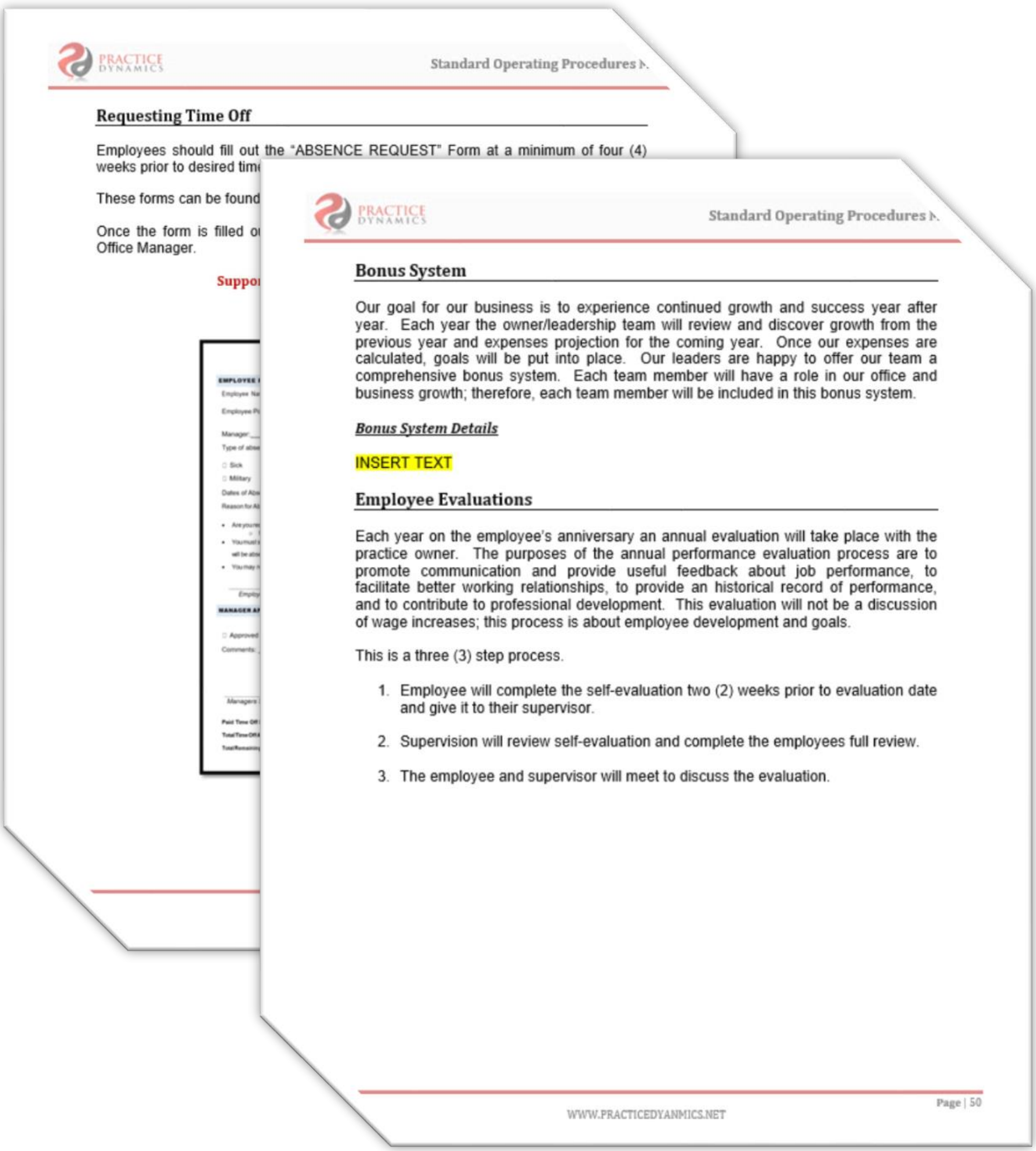
HR/ADMIN

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.



PRACTICE DYNAMICS

Standard Operating Procedures M

Requesting Time Off

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

These forms can be found

Once the form is filled o
Office Manager.

Suppo

PRACTICE DYNAMICS

Standard Operating Procedures M

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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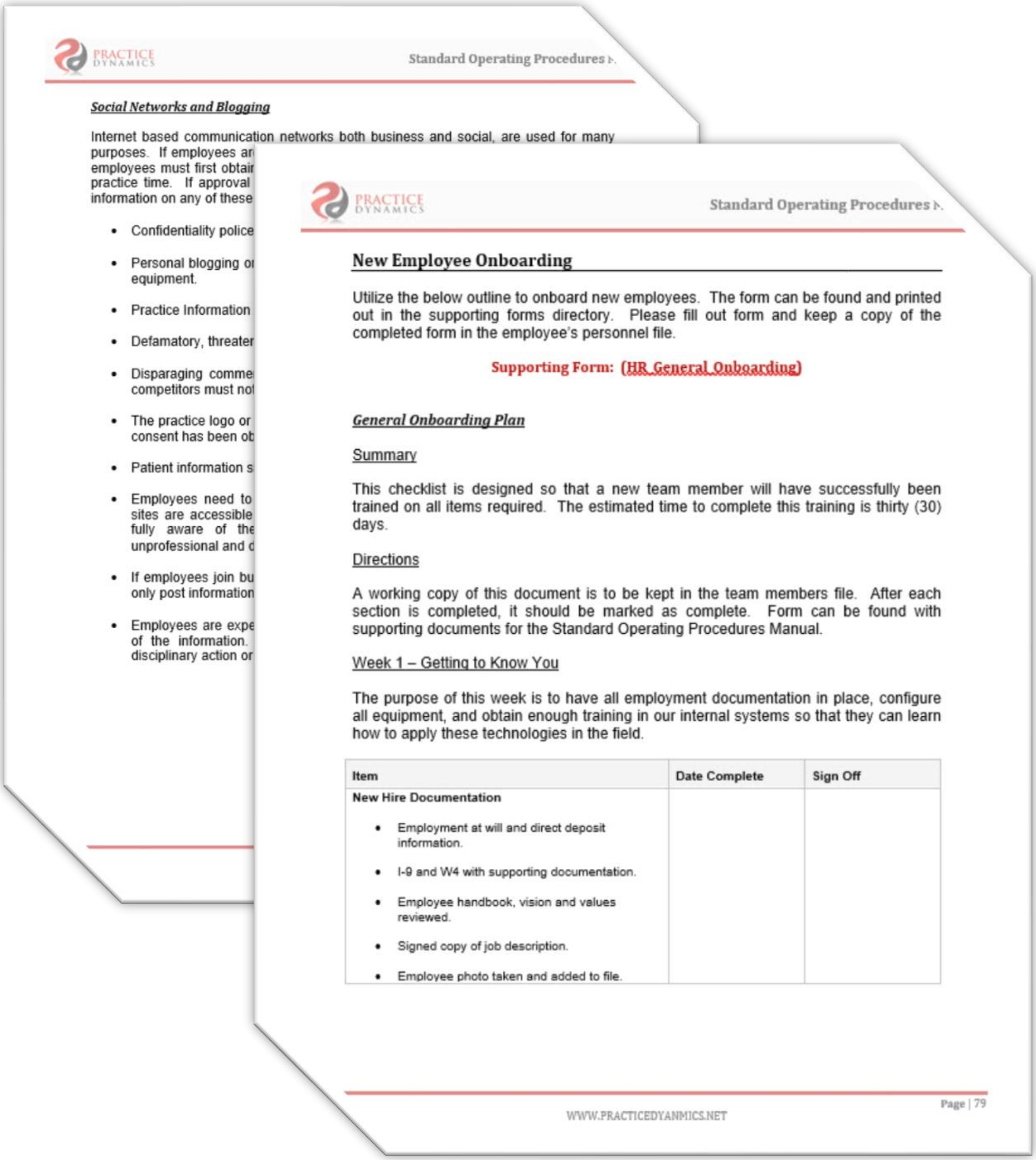
Page | 50

HR/ADMIN

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



PRACTICE DYNAMICS Standard Operating Procedures

Social Networks and Blogging

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

- Confidentiality police
- Personal blogging o equipment.
- Practice Information
- Defamatory, threate
- Disparaging comme competitors must no
- The practice logo or consent has been ob
- Patient information s
- Employees need to sites are accessible fully aware of the unprofessional and d
- If employees join bu only post information
- Employees are expe of the information. disciplinary action or

PRACTICE DYNAMICS 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
New Hire Documentation • Employment at will and direct deposit information. • I-9 and W4 with supporting documentation. • Employee handbook, vision and values reviewed. • Signed copy of job description. • Employee photo taken and added to file.		

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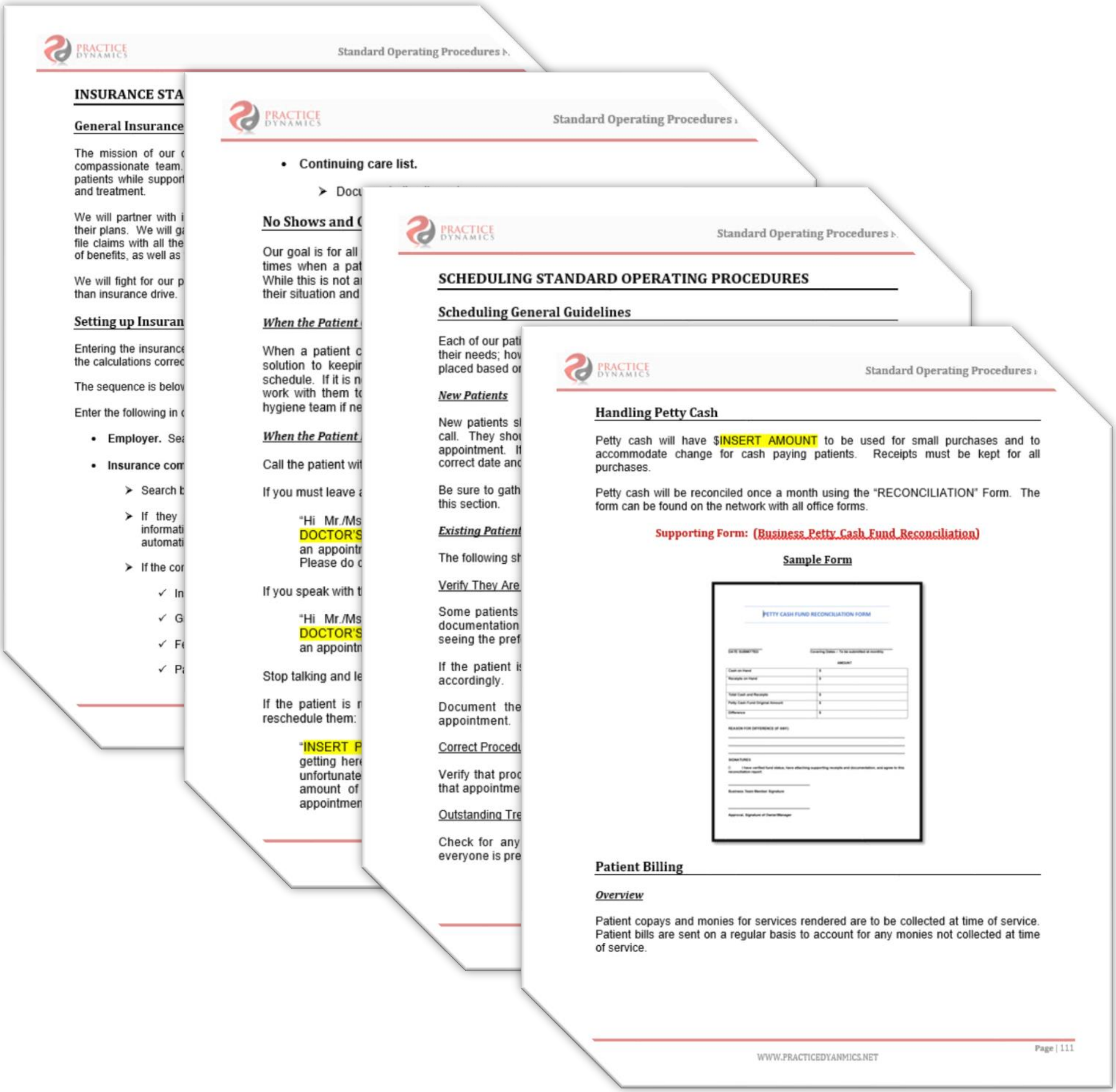
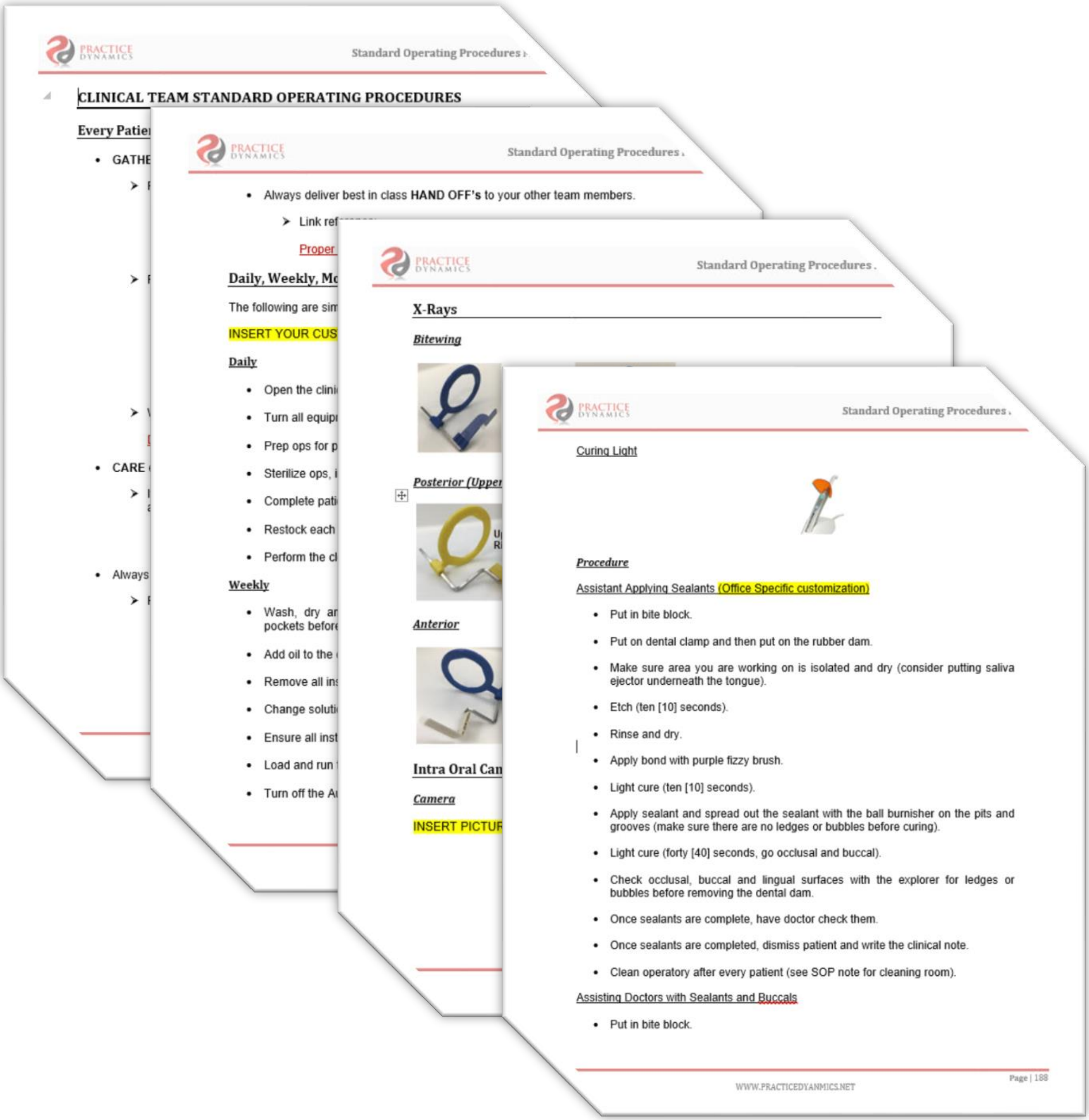
BUSINESS TEAM

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



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.



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.