



New Team Member Training & Checklist

The office manager is to keep this form. When her portion is done, she will pass it on to the Team Mentor. When completed there it will be filed in the new team member's file. The new team member should keep her own copy of the form through the process.

Training before working (Office Manager)

Name: _____

Temporary Hire Date: _____

- ☐ Get Login and task list created
- ☐ Review basics of Open Dental
- ☐ Get locker and name tag ordered
- ☐ Give and Review New Team Member Packet (forms, w4, membership plan, discount & benefits)
- ☐ Give key and review alarm protocol
- ☐ Completed Utah New Hire Registry
- ☐ Verify & get copies of certification and licensure (CPR, Hep B, X-ray certification, etc...)
- ☐ Get voided check
- ☐ Offer/fill out 401k match document
- ☐ Introduce Cascade Team Portal/Handbooks
 - ☐ Go over Mission Statement/Motto/Hedgehog Concept
 - ☐ Review Guiding Principals
 - ☐ Review Pt policies and Procedure
 - ☐ Review Team Policies and Procedure

Completed date (first week)

First Month (Team Mentor)

Team Mentor: _____

Assigned Doctors: _____

- ☐ Review Job Specific Handbook Resources (duties, checklists, etc)
- ☐ Finish thorough review each Patient Checklist
- ☐ Finish thorough review each Proficiency. Date: _____
- ☐ 30 day review/interview w/ assigned doctor. Date: _____

Notes & Goals:

60 Day Review (Assigned Doctor)

- ☐ 60 day review/interview w/ assigned doctor. Date: _____

Permanent Hire Date: _____

Notes & Goals:

I have read, understand, and agree to work according to all the contents in the online Team Handbook.

Signature: _____

Date: _____