Office manager: A real position or merely a title?

In most cases, office managers are dropped into the position with no training. As is often the case, they are bright and energetic, good with patients and the dentist perceives that those skills are all that is necessary to be an effective office manager. Unfortunately, it’s at this point that things start to go wrong.

The employee may exhibit too little initiative or too much control. Others on the team may resent their former colleague being promoted to a managerial position. Often, the dentist resumes direct work direction from the clinician. If there is a job description, it’s typically vague at best. Finally, the dentist begins to wonder if she (or he) has made a terrible mistake.

In most cases, office managers are dropped into the position with no training. The dentist assumes that if the individual has been with the practice for a while, she knows what it takes to do the job. Additionally, clinical staff often look at the designation of “office manager” as a reward for the employee’s hard work and dedication to the practice. Sadly, their good intentions often do not pan out as expected.

The case of “Dr. Smith” is a prime example. He felt very strongly that awarding one of his staff standouts a new moniker was a good idea. After all, everyone appreciates the prestige that goes along with an important title, or so he thought. Initially, Smith was searching for a way to curb staff turnover that had been disrupting his office for several months.

Julie was a good employee. Smith saw her as a rising star. She was bright, energetic and enthusiastic. She had excellent rapport with the patients and the staff, and she was certainly the kind of employee the practice wanted to keep around. The problem was that Smith didn’t think he could pay her much more. Therefore, he reasoned that a new title and new challenges would be the opportunity that would keep Julie from trotting out the door to the practice down the street.

When Smith brought Julie in to his office to tell her that he would like to appoint her as office manager, she was thrilled that Smith felt she was up for the challenge. Julie’s primary responsibilities are scheduling and confirming appointments, greeting patients, making financial arrangements, etc. However, when she inquired as to how her duties might change, the good dentist didn’t have a good answer. He simply told her he’d like to see what she could do and they would go from there.

When she asked if the new position meant an increase in her salary, Smith was non-committal. Julie was puzzled. “What is the point of being named office manager if there is no salary increase?” Julie later confided to a coworker.

Not surprisingly, things went downhill from there. Smith assumed that because Julie was bright and confident, she could design her role as office manager. Yet, with no direction from the dentist, she was making up her duties as she went along. Julie suggested that the team work together to develop some scheduling objectives. Smith thought that might be a good idea, but continually put Julie off each time she raised the issue.

Julie had the title of office manager, but not the responsibility or any decision-making authority. Julie eventually checked out emotionally from the position and then physically from the practice. It was a waste of the potential talent that the dentist recognized in Julie, but he could not bring himself to relinquish control of certain areas or involve a subordinate in a partnership role. It’s a concept that some dentists find just entirely too threatening to pursue.

Every employee must have a job description that clearly defines the job, spells out specific skills needed for the position and outlines precisely the duties and responsibilities. A job title is not a job description. That being said, I readily acknowledge that writing a job description for an office manager is no small challenge.

Job descriptions for multiple positions in the practice — including scheduling coordinator, treatment coordinator, financial coordinator, patient coordinator, etc. — are readily accessible on practice management websites, including McKenzie Management’s site, with the exception of office manager. Why? As Smith’s case illustrates, different dentists interpret the office manager position quite differently; and many interpret the position incorrectly.

The majority of dental practice office managers answer phones, make appointments, do financial arrangements, etc. However, these are the responsibilities of a front office employee or a business coordinator. Certainly, an office manager will step in when necessary to perform these duties when necessary as well, but the role stretches well beyond these tasks.

If your practice is to make the most of an office manager, the appointed person will need a set of skills that goes beyond being a loyal employee who is able to work well with staff and patients. This person should be a natural leader. She (or he) has to be comfortable taking the reins on an issue and addressing it.

Being a good problem solver by nature is essential because the office manager, working closely with the dentist, should be the first point of contact for the patients and the staff when issues arise. In addition, the office manager needs to have the right personality traits for the position. She should be both personable and efficient. In other words, she needs to have a good balance between thinking and feeling in temperament type.

Additionally, if a practice hopes to get the most out of appointing an office manager, the employee should be comfortable working with numbers and be able to access, as well as fully understand, practice reports. Moreover, the office manager must be able to work well under pressure because she will be pulled in multiple directions.

Yet, that is just the beginning. A true office manager is responsible for overseeing practice overhead and her most critical duty is effectively managing the office’s human resources.

The office manager is in charge of recruitment, hiring and firing all employees, performance reviews, schedules, grievances, raises, salary reviews, employee policies and team meetings. The position requires leadership skills and includes overseeing and managing all of the business measurements, analyzing and reviewing the profit and loss reports.

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manager's job description needs to be customized to best fit the needs of the practice, which is why you will not find a generic office manager job description on the McKenzie Management website along with all the other job descriptions.

Rather, we recommend professional training geared specifically for dental office managers. This training should teach the business of dentistry, including each practice system as well as other management specialty areas. From there, the job description is built from scratch with input from the dentist and the office manager so that it serves the needs of the specific practice.

Not every practice needs an office manager. Some dentists are comfortable managing the practice as well as doing the dentistry, while others do not want to be burdened with the management responsibilities. My advice is that you don't toss around the term office manager lightly. This is a position that carries significant responsibility and requires specific skills. If you do appoint an office manager, give her the tools to succeed via professional training.

Sally McKenzie is a nationally known lecturer and author. She is CEO of McKenzie Management, which provides highly successful and proven management services to dentistry and has since 1980. McKenzie Management offers a full line of educational and management products, which are available on its website, www.mckenzie mgmt.com. In addition, the company offers a vast array of Business Operations Programs and team training. McKenzie is the editor of the e-Management newsletter and The Dentist's Network newsletter sent complimentary to practices nationwide. To subscribe visit www.mckenzie mgmt.com and www.thedentistsnetwork.net. She is also the Publisher of the New Dentist™ magazine, www.new dentist.com. McKenzie welcomes specific practice questions and can be reached toll free at (877) 777-6151 or at sal lynnek@mckenzie mgmt.com.

Does a dental practice need an employee handbook?

By Stuart J. Oberman, Esq.

For a practicing dentist who aims to always deliver high-quality patient care, staff retention is an important value. Staff retention aids the dental practice in providing stability and continuity and eliminates the high costs associated with employee turnover.

Obviously, staff members are more likely to continue working when they feel they are treated fairly and consistently. In this respect, an employee handbook is important to a dental practice as it documents the practice’s policies and procedures, sets expectations and provides for a framework for uniformity.

An employee handbook can be a valuable communication and employee relations tool because it demands consistency among managers and clearly dictates employee policies. The employee handbook allows an employer to lay out what he or she expects from employees and what employees can expect from the employer.

Clear office policies lend support to disciplinary procedures and reduce any likelihood of discrimination charges. In addition, handbooks often help new employees get acquainted with their new position and let them know what is expected of them.

For an employee handbook to be most effective, it should be written in a simple, clear, organized and concise manner to avoid confusion among employees. The employee handbook should be easy to use so that employees may refer back to it as often as they wish. The employee handbook should be distributed to every employee in the dental office.

When you distribute your employee handbook, allow all members of your dental practice an opportunity to read it. Each employee should then sign and date an acknowledgment form that states they understand and agree to be bound by the policies outlined in the employee handbook.

An electronic copy of the employee handbook should be stored on a computer that all employees can access, and a bound copy should be kept in the office for general reference. The handbook should also be updated as office policies change and each employee should sign an acknowledgment for each change.

Dentists should refrain from using terminology that may imply that the handbook is an employment contract, and from making statements such as 'your employment will not be terminated as long as your job duties are satisfactorily performed,' as this implies a long-term commitment.

While employee handbooks will vary among dental offices, there are guidelines for dentists to follow in creating their employee handbook. There are numerous laws that govern the relationship between employer and employee. Many of these laws apply to even the smallest dental practices.

Therefore, it is important for the employee handbook to reflect these laws. In addition, many provisions should be included in the employee handbook to promote uniformity, thus helping employees present a united front to patients and to reduce the risk of an employee initiating a lawsuit for unfair treatment.

Every employee handbook should begin with an introduction, which should welcome new employees and introduce your practice’s goals, mission statement and history. There should also be a disclaimer stating that the employee handbook is not an employment contract and does not affect the employment-at-will doctrine. After this introduction, the employee handbook should briefly describe several subjects.

It would be prudent to include job descriptions in the employee handbook, so each employee knows what is expected of him or her. Performance reviews and grievance procedures should be discussed and work schedules and dress code should be outlined. The handbook should identify the days and hours of the workweek as well as schedules for lunch and breaks.

Full-time employees' work schedules should be defined and differ- entiated from those of part-time employees. Compensation and benefits should be detailed and should inform employees of the payroll schedule, holidays, vacation, sick leave, bereavement, jury duty, military leave, leave of absence and health insurance.

If your dental office has 50 or more employees, you must comply with the Family and Medical Leave Act, and this should be included in the employee handbook. Personal use of the telephone and Internet, procedures for safety and hygiene of dental employees as well as policies on smoking and substance abuse should be included as well.

The employee handbook should contain an anti-harassment policy as well as an Equal Opportunity Employment provision stating that your dental practice will not discriminate in offering employment. These provisions are extremely important, as they make it clear that you will not tolerate harassment or illegal discrimination, describes the steps that can be taken to report violations of these policies, outlines the steps that the dentist will take in responding to these allegations and confirms that the dentist is an equal-