Checklist for Bringing on a New Associate Dentist

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1. Legal and Contractual Preparations

- ☐ Draft and review the associate’s contract.
- ☐ Ensure malpractice insurance coverage is active.
- ☐ Verify state licensure and DEA registration.
- ☐ Set up payroll and determine compensation structure (salary, commission, or hybrid).
- ☐ Discuss and finalize non-compete and confidentiality agreements.

2. Credentialing and Insurance

- ☐ Begin credentialing with insurance companies (start early, as this can take weeks or months).
- ☐ Verify network participation with insurance carriers.
- ☐ Update practice management software with the new provider’s details.

3. HR and Onboarding Paperwork

- ☐ Collect necessary documents (government ID, licenses, certifications, immunization records).
- ☐ Set up tax forms (W-4, I-9).
- ☐ Establish employee benefits enrollment (if applicable).
- ☐ Provide and review the employee handbook.
- ☐ Complete and sign HIPAA and OSHA compliance forms.

4. Clinical and Operational Setup

- ☐ Assign and prepare operatory space and ensure equipment is fully operational.
- ☐ Set up access to practice management software (e.g., Dentrix, Eaglesoft, Open Dental).
- ☐ Create login credentials and email accounts.
- ☐ Provide training on workflows, policies, and protocols.
- ☐ Review charting, coding, and documentation standards.

5. Scheduling and Integration

- ☐ Announce new associate to the team and patients.
- ☐ Adjust appointment schedules to accommodate the new associate.
- ☐ Introduce the associate to key referring doctors.
- ☐ Plan shadowing days for the associate to observe and integrate with the team.

6. Marketing and Promotion

- ☐ Update the practice website and marketing materials to include the new associate.
- ☐ Announce the associate's arrival on social media and in patient newsletters.
- ☐ Offer promotional deals to encourage appointments with the new associate.
- ☐ Notify insurance companies for updated referral listings.

7. Team and Patient Communication

- ☐ Host a team meeting to welcome the new associate and discuss their role.
- ☐ Prepare scripts for front desk and phone staff to introduce the associate to patients.
- ☐ Provide team training on integrating the associate into patient care workflows.

8. Monitoring and Feedback

- ☐ Schedule regular check-ins with the associate.
- ☐ Set and review performance expectations at 30, 60, and 90 days.
- ☐ Collect feedback from patients and team members on the associate's integration and performance.

Stay organized and ensure a smooth transition by using this checklist every time you bring on a new associate!

For more resources, visit dentalofficemanagers.com

Meta Description for SEO: Easily onboard your new associate dentist with this step-by-step checklist for dental office managers. Download the free checklist and streamline your hiring process today!