‘She has computer experience …’ (Just not the kind your office needs)

How to determine if a potential employee has the necessary skills and experience a position requires

By Sally McKenzie, CEO

“Experience,” it’s a word that conveys different meanings to different people. When seeking employment, applicants naturally want to convince their prospective bosses that they bring the necessary experience to the position.

Meanwhile, employers — dentists specifically — often are in the difficult position of trying to fill vacancies quickly. Many don’t typically need a lot of convincing that the applicants they interview and hire can smile and be friendly. The one for their office, particularly when the applicant asserts that she/he has what it takes to do the job.

A scenario

Let’s look at “Dr. Carrel.” His business employee of 12 years decided it was time for a change of scenery and accepted a position out of state. That left Dr. Carrel frantically trying to fill the position. In walks applicant “Amanda.”

Amanda has worked as a receptionist and a clerk in the children’s department at a large retail store, which must mean she’s good with people and well organized. “Both are very important qualities for this job,” a stressed Carrel notes to himself.

During the interview, Carrel dutifully covers the usual questions with Amanda, listening closely for those things he wants to hear.

“Do you have experience with scheduling?” asks Carrel.

“Certainly,” Amanda says. Meanwhile, she’s thinking to herself: I have to get in the shower by 7 a.m., make the train by 8 a.m., be at work by 9 a.m., at the gym by 5:30 p.m. so I can be out with friends by 8 p.m.

“Do you have computer training?”

“Of course,” Amanda says emphatically. In her mind she ticks through virtually everything you must know to be a great computer user. “I know how to buy and sell butter,” she adds.

Do you have experience with computer software?” asks Carrel.

“Both are very important qualities — both clinical and business — are often expected of an office manager,” says Carrel.

But the applicant only has superficial knowledge of the program, find out whether it is growing or declining in and how many patients are leaving, what percentages of your practice is insurance and what is private pay, what percentage of the insurance base is this company or that and so on.

The wealth of critical information is virtually boundless provided that your team knows how to access and interpret it. If the job requires the employee to compile spreadsheets using Excel, but the applicant only has superficial knowledge of the program, find out before she/he is on the job.

If staff are expected to compile letters to patients, doctors, insurance companies and others using Microsoft Word and the applicant has no idea how to use the formatting options within the program, better to learn that now than discover it in six weeks.

Don’t allow yourself or your team to be surprised by what a new recruit doesn’t know. Test applicants’ skills before you ever offer them a front row spot on your team’s bench.

For example, if you’re hiring a new office manager, this applicant’s skills should be evaluated in a number of areas. Consider this approach.

First, make up a “dummy” patient on the computer and ask the applicant to put together a treatment plan. Then schedule the patient for multiple appointments.

Next, ask the candidate to post from the treatment plan. From there, the applicant should be asked to gather insurance information on the “dummy patient.”

Finally, the applicant should be
able to create a treatment proposal and a financial option sheet. These are the basics. When the applicant performs these tasks, you will be able to observe skill level and decide the need for additional computer training.

Will the investment necessary to bring this person up to speed be too great or do her/his strengths outweigh the weaknesses? Can the shortfalls in her/his skill levels be overcome with proper technical training?

You’ll have clearer answers to those important questions if you carefully evaluate the applicant’s current skill level. If you choose to train, make the most of the teaching opportunities across the entire staff.

If you’re planning to train the new employee in-house, consider exactly who is going to take on that responsibility. If it’s you, the dentist, do you plan to see patients in the morning and clear your afternoons so that you can teach the new employee how to use the systems?

Chances are great that you have neither the time nor the inclination to take on this responsibility. If the responsibility falls to another staff member, do you plan to pay her/him extra so that training the new recruit can take place after hours?

What is the competency level of the person training the new employee? Is this person the “beneficiary” of layers of information that have been passed down from one worker to the next and still just trying to figure things out herself/himself? Alternatively, is the trainer truly an expert on how to use the systems fully and effectively?

Training? Make it real and relevant.

Certainly, well-trained staff can be helpful in familiarizing new employees with computer systems, but plan to budget for professional training and make the most of those dollars spent.

Take specific steps to build a line-up of software superstars with an effective training system.

Bring the software trainer in to teach the employee specific skills and document each session so that the new employee, as well as others in the practice, can review steps for completing specific tasks and check their level of mastery.

Keep the documentation in your Dental Business Training Manual along with a checklist of computer system skills specific to your practice that each employee should have mastered.

Each time you integrate new technology or make use of a new tool in your computer software, add the training steps to your training manual.

This will allow seasoned staff to review procedures that they don’t use regularly and new staff to master new systems more quickly and efficiently.

Finally, remember the three-month rule of thumb. In general, it takes three months of supervised training to get a new hire up to speed. Don’t assume that new hires know every aspect of their job because they say they do.

Monitor a new hire’s performance during the 90-day training period and have a senior team member check the accuracy of the work with the intention of coaching, not criticizing.

Front office accuracy in new patients, collections, production and retention can be checked by the daily and monthly reports run by the computer. Instructions on reading these important reports should also be incorporated into the curriculum no matter which system you are using.

Office manager skills test for new hires

Step 1: Create a ‘dummy’ patient in the computer.

Step 2: Ask the applicant to:

- assemble a treatment plan for this patient.
- schedule multiple appointments for this patient.
- post from the treatment plan.
- gather insurance information on this patient.
- create a treatment proposal.
- create a financial option sheet.

Step 3: Now that you know the applicant’s skill level, ask yourself:

- Will the investment necessary to bring this person up to speed be too great?
- Do the applicant’s strengths outweigh her/his weaknesses?
- Can the shortfalls in her/his skill levels be overcome with proper technical training?

About the author

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