Associate Opportunity Notes

Dental Tool Lab

PRACTICE _____ DATE _____ PEOPLE I MET _____

Role classification: ○ W-2 employee ○ 1099 contractor ○ Not discussed

SCHEDULE NOTES

What would my schedule look like?

Circle: M T W Th F Sa Su Typical hours: _____

How does the office usually handle holidays, vacation weeks, or planned closures?

THE OPENING

What is creating the opening?

○ Practice growth ○ Owner reducing hours ○ Replacing an associate ○ New location ○ Other: _____

Have they had an associate before?

○ No prior associate ○ Yes - still here ○ Yes - position is open now

Typical days/week: _____ Typical monthly production: $_____

PATIENT FLOW NOTES

New patients/month: _____ Recare exams/day: _____

Patient mix: FFS ____% PPO ____% Medicaid ____% HMO ____% Other ____%

How would patients and treatment make their way onto my schedule?

New patients, emergencies, hygiene exams, unfinished treatment, and owner/associate allocation.

What would a realistic first few months look like?

CLINICAL NOTES

What will my clinical setup look like?

Assistant support, operatories, hygiene support, and equipment.

What procedures would they expect me to do regularly?

Which procedures are referred out today?

TEAM, CULTURE, AND SUPPORT

What would support or mentorship look like?

Things that really stood out...

Things that gave me pause...

NEXT STEP

What happens next?

○ Shadow day ○ Meet the team ○ Second conversation ○ Written offer ○ Follow-up

Expected date: _____ Contact: _____ My follow-up: _____

Associate Opportunity Notes / offer details

Dental Tool Lab

PRACTICE _____ DATE _____ PEOPLE I MET _____

COMPENSATION NOTES

How would I be paid?

○ Salary ○ Daily guarantee ○ Gross production ○ Adjusted production ○ Collections ○ Base + bonus

Rate/guarantee: _____ Expected production: _____

Is there a guarantee while the schedule builds?

Amount: $_____ per ○ day ○ month Duration: _____ months ○ True guarantee ○ Draw/reconciliation

What adjustments or deductions affect compensation?

PPO adjustments, lab fees, collection rate, refunds, remakes, exclusions, or thresholds.

Office collection rate: _____% Signing/one-time bonus: $_____

BENEFITS AND TIME AWAY

What benefits are included?

Health insurance, retirement, CE, licenses, dues, malpractice, and other benefits.

How does paid time off work?

Days available, whether time is paid, and the rate used.

MALPRACTICE AND CONTRACT NOTES

How is malpractice handled?

Who provides the policy, required limits, claims-made vs. occurrence, and tail coverage.

What contract terms matter most?

Trial period, notice, without-cause termination, noncompete radius/length, nonsolicitation, and repayment terms.

AFTER THE OFFER

What do I still need to ask or verify?

OVERALL IMPRESSION

Overall excitement: 1 2 3 4 5

Would I be excited to come back tomorrow? ○ Absolutely ○ Maybe ○ Probably not

Final thoughts