



Onboarding Confirmation

Office Name: _____

Loop Champion Name: _____

Name of Trainer: _____

Training Dates: _____

Attendees

- Doctors _____
- Clinical _____
- Admin _____
- Territory Manager _____

Before Training

- Accessed LOOP Resource Center
- Referring Offices Entered: _____
- Referring Offices Scheduled: _____
- Letterhead Reformatted
- Dr. Signature(s) Reformatted
- Letter Templates Completed

Office Set Up

- Log in Doctors
- Create Office Users
- Assign Admin Role to Users

Treatment Plan Templates

- Create New
- Edit Existing
- Delete Edited
- Create Hygiene

Dashboard Overview

- Search Patients
- Show All
- Home Button
- New Patient
- Notifications
- Patient Discussion
- Settings
- Live Chat

Referral Form

- Verify Doctors
- Add First Available or No Preference
- Double Verification System

Patient Profile

- Edit Patient Information
- Reassign Patient to New Office
- Add Encounter
- Request Referral
- Patient Discussion
- Request Referral Functionality
- Archive Referral/Encounter
- Upload a file
- Upload Multiple Files/CBCT
- Traditional Impression v. Digital Impression

Letters

- Create
- Approve
- Active v. Inactive
- Share
- Add Addendum
- Add x-ray or image
- Add Periodontal Charting
- Hygiene Report Added

User Roles

- Incoming Referrals: _____
- Enter New Patients: _____
- Patient Discussion: _____
- Letters: _____
- Upload Scans: _____
- Enter Appointment Dates: _____
- First on Live Chat: _____

Referral Office Onboarding

- Completed by end of training: _____
- Demo Account Log ins: _____
- First time log in
- Info Sheet
- Password Tracker



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Next Steps

- Tech Support Contact
- Next Referral Onboarding: _____
- Referring offices per week: _____
- Access to the User Manual
- Use Training Resource Center
- Ongoing training/Live Webinars

By signing below, you acknowledge the above points were covered and you had sufficient opportunity to review with your LOOP trainer. You also agree to onboard team members who were not present for the scheduled training as it is essential to effectively using LOOP.

Signature: _____

Name: _____

Title: _____