

Agenda for General Staff Meetings

1. Personnel Department

- a. Personal-successes-and-events-sharing time
- b. Work schedule, vacation, holidays, continuing education courses, etc
- c. Training -- new team members, OSHA, continuing education programs
- d. Staffing needs
- e. Teamwork -- status, needs, activities

2. Financial Department

- a. Income comparison by actual \$'s or by % of increase or decrease over last month or year to date:
last year to date
 - Production this month to last month; YTD (year to date) to last YTD
 - Collections this month to last month; YTD to last YTD
- b. % of collections to production (to calculate: divide collections by production for same period)
- c. Sources of payments
 - Cash/checks over the counter -- % of collections (goal 40 - 50%)
 - Bank card payments (monitor charge card use)
 - Insurance
 - 1) Number claims filed
 - 2) Amount filed; amount paid; % of collections
 - 3) New carriers (employers providing dental insurance or direct reimbursement)
 - 4) Problems collecting claims from carriers
 - 5) Patient feedback; complaints; comments
 - Managed care, welfare -- % of collections
- d. Write offs
 - Managed care; welfare • Bank card costs • Charity • Total: MTD \$_____, YTD \$_____
 - Courtesy discounts • Bankruptcy • Bad debt
- e. Billing date; number of statements mailed
- f. Accounts receivable; total and aged categories: current, 30 days, 60 days, 90 days, 120 days; in collections
- g. Accounts payable
- h. Budget reconciliation & update, priority needs for cash outlay

3. Scheduling Department

- a. # of days worked; # of hours worked
- b. # appointments scheduled; # seen; % show rate for treatment and for hygiene (show rate = # seen as appointed ÷ # appointed)
- c. # broken appointments; # rescheduled
- d. Daily production goal; actual average daily production
- e. Daily collection goal; actual average daily collection
- f. Chart audit: # active patients; # made inactive and reasons

4. Operative Department

- a. # of treatment appointments
- b. % show rate
- c. % treatment scheduled of treatment diagnosed (treatment scheduled divided by treatment recommended)
- d. Production -- \$_____; treatment is _____% of total production
- e. Top five fee producing procedures
- f. Lab cases -- any problems? successes?
- g. Inventory -- control? problems? costs?

5. Hygiene Department

- a. # recare appointments; # needed to meet effectiveness goal, that is 80% of active patients
- b. % show rate
- c. Analysis of appointments -- 3 month, 6 month, perio, home care, etc.
- d. Production -- _____; hygiene is _____% of total production

6. Marketing Department

- a. # of new patients this month; this month last year; YTD; last YTD
- b. # of patients inactivated.
- c. Online activities – website, social media postings, reviews, etc.
- d. # and type of community contacts; referral thank you's; other contacts
- e. Report on past and future marketing activities, costs, dates, successes, failures.
- f. Analysis of compliments and complaints from or about patients; from or about suppliers; etc.

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