

Business Systems Inventory

Personnel

- number needed
- hiring process
- performance appraisals
- personnel records
- work schedule
- training, including OSHA
- central calendar; office manual
- staff meetings & planning retreats
- delegation to staff
- continuing education
- fun
- confidentially

Physical facility

- workstations
- tidy desk
- bathrooms
- repairs & maintenance
- business equipment
- storage; janitorial service

Telephone — instruments needed; verbiage to be used with callers

- number of lines into office
- new exams
- cancelled appointments
- greeting
- referrals
- "shoppers"
- appointments
- confirming — computer, text, phone

Receiving patients — scheduling and check out

- check-in process
- pattern for block scheduling
- check-out process
- monitor show rate — goal = 90% or better

Broken or cancelled-not-rescheduled appointments

Chart processing

- documentation — consistency on computer or paper records
- inactivation & purging

Recare system

- minimum goal = 80% of active patients

Production — goal and getting there

- fee schedule

Collections — goal and getting there

- payment sources
- daily balancing
- petty cash
- billing process
- daily deposit
- report to Dr.
- refunds and write offs
- accounts receivable management

Insurance and other third-party processing

Data entry (if not mentioned as part of another process)

Inventory control and ordering (business area)

Accounts payable

Paperwork, forms, computer records — appearance and consistency

- reworking forms
- reproducing forms
- correspondence
- filing
- retention schedule
- HIPAA requirements

Bookkeeping; payroll; benefits administration; processing mail

Emergency system; CPR training; OSHA training, records and regulations; HIPAA compliance

Marketing

- new patient per month goal
- activities
- budget
- coordination - "Who will do what?"

Errands and outside agenda/people coordination

- hospital cases
- off-site meetings for doctor(s) and for staff

Doctor(s) schedule and calendar

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