

Use these questions to get yourself thinking about your systems and processes in your practice:

Scheduling

- When team members answer the phone in your office, do they know where to put an emergency or other types of appointments? Every person who answers the phone needs to understand where those patients go in your schedule.
- Are you blocking your schedule?
- Do all team members know how to schedule efficiently in your office?
- Do all team members know how you like certain procedures to be scheduled, such as next to one another? Can some procedures never be scheduled against other procedures?
- Are you scheduling to your daily financial goal?
- Do both you and your hygiene department follow a process to keep each schedule full?
- Do you make sure that each patient has an appointment in the future before they leave your office? If they can't schedule one while they're standing in front of your scheduling coordinator, what is your next step?
- Are you collecting your patients' full information, like their cell phone numbers and email addresses, so you can communicate easily with them?
- Are you asking your current patients for referrals or social media reviews?
- Does your team understand the insurance and verification process in your office?
- Are you verifying your patients' insurance plan before their appointments?
- Are you sending claims on the day of service?

Communication Between Departments

- How is the communication between your clinical and administrative teams?
- How will your administrative team members know what to schedule for the patient's next appointment?
- Are they getting all the information they need to file a claim?
- If needed, are they getting the necessary information to write a narrative, depending on the procedure code?
- Do you have enough information in your clinical notes to appeal a claim, if needed?

Clinical Team

- Are they including notes after each patient has been seen?
- Are the clinical notes complete? Could they pass a chart audit?
- Is every operatory ready for each procedure?
- Does your assistant ever need to leave the operatory to get something else?
- When the patient is seated, are they prepared and ready for each scheduled procedure?
- Do you know what each patient needs for each appointment?

- What is your ordering process?
- Do you run out of supplies or do you have too much inventory on hand? The more inventory you have on hand, the more it will cost. Your cash flow will be tied up in your inventory.
- Does your team support your findings as a doctor? Do they partner with you about completing the needed treatment?
- Are they using all the tools you have bought for patient care?
- Are they using all oral cancer screening tools?
- Are they using other tools you've purchased, such as inter-oral cameras?
- Are they discussing outstanding treatment plans at each appointment?

For the Doctors

- Do all team members understand all of your practice goals?
- Do they understand all the specific metrics you are measuring and, more importantly, their impact on those metrics?
- Are all of your office protocols written down?
- When was the last time that you reviewed your written protocols with your team members?
- How are you holding your team accountable for these protocols?
- What process are you following to achieve your goals on a daily, weekly, and monthly basis?