

# Practice Systems Inventory

## Personnel

- number needed
- hiring process
- salary and benefits
- personnel records
- work schedule
- training, including OSHA
- performance appraisals
- staff meetings and planning retreats
- confidentiality
- continuing education
- fun as a team

## Physical Facility

- sign
- parking lot
- operatories
- reception area
- business desk
- patient flow
- repairs and maintenance
- building and grounds
- bathrooms and cleanliness

## Business Desk

- staffing needs and workstations
- telephone lines and instruments
- processing of charts
- confirming appointments
- computer system, website, social media postings, email, etc.
- mail handling
- scheduling pattern/block; control
- telephone techniques and verbiage
- script for “shoppers”
- referrals—in and out

## Patient Flow

- process to welcome new patients—new patient packet mailed
- greeting and check in; check out
- online and print media—must be current, attractive, pertinent, and present a positive image

## Finances

- production and collection goals
- accounts receivable management and aging
- fees
- banking
- collection procedures; posting payments
- insurance, other third-party processing
- budget and overhead control
- petty cash

## Scheduling for the Dentist

- work hours—patient, administrative
- process for broken/cancelled-not-rescheduled appointments
- block scheduling by like-treatment
- calendar and meeting schedule

## Scheduling for the Hygienist

- preappointed recare system
- by patient need, not time
- check at least quarterly for effectiveness—80% of more of active patients enrolled

## **Operatory**

- staffing needs
- sterilization
- organization
- collateral duties—order supplies, maintain equipment, emergency system, etc.
- lab delivery system
- OSHA compliance—manual, training, records
- fluoride use; home water check
- equipment, instruments
- time savings; efficiency

## **Inventory Control**

- for operatory
- costs compared to budget
- for business desk
- Practicon's Supply Manager—call 1-800-959-9505 for information

## **Administrative**

- practice administrator's role
- office manual
- delegation to staff
- accounts payable
- accountant, lawyer, management consultant
- computerization and data entry
- central office calendar
- trouble shooting
- annual budget
- payroll and benefits administration
- practice business monitors—daily, weekly, monthly, annually

## **Practice marketing and the role of Marketing Coordinator/Dental Health Educator**

- new patients per month goal
- marketing budget
- activities
- measuring success