

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 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
 - 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 hygiene
(to calculate: divide # seen as appointed by # appointed for same period)
 - 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. Restorative 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 80% effectiveness goal
 - 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.