

Business Systems Inventory

Personnel

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

Physical facility

- work stations
- tidy desk
- bathrooms
- repairs & maintenance
- business equipment
- storage

Telephone

- number of lines into office
- new exams
- cancelled appointments
- greeting
- referrals
- "shoppers"
- appointments
- confirming

Receiving patients - - scheduling and check out

- patient days on calendar
- pattern for block scheduling
- check out process
- monitor show rate

Broken or cancelled-not-rescheduled appointments

Chart handling

- pulling
- filing
- documentation
- inactivation & purging

Recare system

- minimum goal = 80%.

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 and forms

- 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
- budget
- coordination - "Who will do what?"

Errands and outside agenda/people coordination

- hospital cases
- meeting for doctor(s)

Doctor(s) schedule and calendar