

Practice Systems Inventory

Personnel

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

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 work stations
- telephone lines and instruments
- pulling, filing, inactivation of charts
- confirming appointments
- mail
- scheduling pattern/block; control
- telephone techniques and language
- script for “shoppers”
- referrals - - in and out

Patient Flow

- process to welcome new patients - - new patient packet mailed
- appearance and wording of patient charts and forms, letters and other paperwork
- greeting and check in; check out

Finances

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

Scheduling for the Dentist

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

Scheduling for the Hygienist

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

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
- Practicon's Supply Manager -- call 1-800-959-9505 for information
- for business desk

Administrative

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

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

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