

CHECKLIST FOR SUCCESS

WELL-PLANNED DAY

- ✓ Morning meeting is held, agenda is followed, all team members are present & on time.
- ✓ Provider production goals are reviewed for today and next three days. Where can we "Go the extra mile" today?
- ✓ Best times for emergency patients.

SCHEDULING

- ✓ Daily production goals are used and scheduled for. Daily production is written on the top of the daily schedule.
- ✓ Pre-blocking time in the software schedule: H/OP, E/OP, S/OP, EMG, NP
- ✓ Keep a "Priority List" so that openings are filled right away.

NEW PATIENT EXPERIENCE

- ✓ Warm and friendly telephone contact.
- ✓ Send thank you to referral source.
- ✓ Telephone information slip is shared with the team.

PATIENT VISITS

- ✓ Call patient & parent by name.
- ✓ Patient is seated at scheduled appointment time.
- ✓ Patient/parent is told what will be done today and informed of any follow-up care/post op instructions.

FINANCIAL

- ✓ Parents sign treatment plan and are informed of the estimated treatment cost before any treatment is performed. Copy is scanned into software and original given to parent.
- ✓ Estimated patient portions and deductibles are collected at the time of service.
- ✓ Billing is done daily on 21-day cycles.

TEAM EFFECTIVENESS

- ✓ Team clearly understands and abides by the vision, culture, and goals of the practice.
- ✓ Team meetings are held monthly to discuss patient care and practice development.
- ✓ Action plans are used at each meeting and reviewed for completion and implementation.

MONITORING

- ✓ Daily production goals are shared at the morning meeting and discussed how the current day and next two days will meet them. How will goals be achieved?
- ✓ Scheduling Effectiveness is reviewed if 95% or below.
- ✓ Monthly Practice Vital Signs Report is reviewed by the entire team at monthly team meeting.

OFFICE

- ✓ Office is impeccably clean, everywhere! Front desk, reception area, bathroom, treatment rooms and consultation room.
- ✓ Patient education material is provided and is in excellent condition.
- ✓ High quality and standards are displayed throughout the office. Everything the patient sees, hears and touches makes them want to tell others about their incredible experience.



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