

What Makes Other Offices So Successful?

To get to peak efficiency you need to take one step at a time.

BY LYNN HOMISAK, PRT

To Our Readers: There are no foolish questions. Chances are that if you have a question or concern in your practice, others are experiencing a similar situation. We're here to help. PM [doctor and staff] readers are encouraged to submit questions to lynn@soshms.com which will be printed and answered in this column anonymously.

Re: "Nuts-N-Bolts" Standards of Practice

Dear Lynn,

What will it take to improve our front desk operations? How can we make sure productivity is at its highest, things are getting done efficiently, and expectations of outcomes are realized?

If by "improve", you mean how can you run your front desk "economically, organized, effectively, streamlined, and profitably", it starts with momentum, S.M.A.R.T. goals (Specific, Measurable, Attainable, Realistic and Timely), and continuous communication.

The first questions you should

ask yourself are, "Are we at 100%?", "Why not?", and "What makes other offices so successful?" Prosperous offices utilize nuts-n-bolts standards of practice and are consistent in their operations. They seek and hire the right people and put the necessary time and effort into orienting,

that it **IS** possible in today's environment to thrive. They don't get there just because they "wish" success. Everyone wishes success. They get there because they smell it, taste it, and go after it! They recognize that improvement happens when action is taken and everyone in the practice is

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training, and managing them to be top-notch, positive employees. They do not function on guesswork but on realities. They strive to eliminate waste, encourage an exchange of ideas, and carefully monitor and measure efficiency (inputs and outputs) on a regular basis. Finally, they celebrate their achievements and when all is said and done, that work is rewarded with success.

Successful practices are evidence

equally committed and on the same page. They understand that shortcuts leave room for shortcomings.

If you truly want change, you must, well, make changes! Start with an Action Plan. Then **prioritize your efforts to facilitate changes that offer the greatest outcome.** Don't fall into the "overwhelm trap" by focusing on the big picture. Instead, take one project at a time. And only after

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Category	Action Steps	Resp.Owner	Target Date	Status O,P,C*
Phones	Etiquette & professionalism—How to answer and speak on the phone			
	Positive framing (using right & wrong words)			
	First impressions			
	Incoming and outgoing call protocol			
	Patient appointment reminder calls			
	Scripts; Role playing various scenarios			
	Retrieving messages and follow-up. (Routing all messages to appropriate sources—patient requests, calls for doctor, billing inquires, etc.)			
	Directing new patients to information and paperwork via website			
	Multi-tasking phone calls; multiple phone lines; hold "buttonitis"			
	Understanding/delivering exceptional customer service			
Scheduling	Screening patients for insurance eligibility			
	Professional and accurate responses to questions without giving medical advice			
	Savvy in (EMR) scheduling software			
	Use and enforcement of scheduling policies			
	Proper placement of appointments			
	Time allowances when treating various conditions			
	Rescheduling patients			
Staff Positioning- Qualifications	Wait lists and patient follow-up via cancellation log			
	Offering and capturing appointments			
	Triaging complicated vs. routine vs. follow-up			
	What does it mean to sit in the "hot seat"?			
	Greeting patients			
	Difference between being in control vs. controlling			
Necessary Front Desk Policies	Difference between being polite vs. demanding			
	Difference between being friendly vs. being friends			
	Accepting responsibility vs. blame			
	Proper positioning based on strengths & talents			
	Educating patients in their financial policy/responsibilities			
	Deductible and past due balance collections			
	Copy collections			
	Missed appointments/no shows			
	Cancellations			
	Late Arrivals			
Training	Walk-ins			
	Emergencies			
	Physician referrals			
	Insurance referrals			
	Have a complete understanding and adherence to employee manual policies			
	Overseeing daily performance and annual performance reviews			
	Participate in and contribute to staff meetings			
	Job descriptions, duties and expectations			
	Aligning with practice goals & mission statement			
	Position on organizational chart			
EMR	Understanding how their progress/productivity will be measured and monitored			
	Understanding and participating in office function & flow			
	Potential inhibitors/roadblocks to effectiveness			
Collections	Job/Role sharing			
	Importance of attention to detail			
	Access to necessary training tools (procedure manual, mentor, checklists, guidelines, etc.)			
General	Data input accuracy			
	Know how to access patient records			
	Understanding and operation of software including troubleshooting and installing updates			
	Money handling; credit card operations			
Other Front Desk Tasks (extend this category as needed)	Daily collections rate			
	Embezzlement safeguards			
	Effective collection techniques & tools: Copays, deductibles, self-pay and co-insurances			
	Manage patient check-in and check-out			
	Regular maintenance of reception area			
	General organization skills			
	Handling and routing mail			
	Machine operations (printer, scanner, copier, fax, credit card, postage machine, etc.)			
	Records release requirements			
	Time management & multi-tasking			
	Compliance: HIPAA, OSHA regulations			
	Documentation responsibilities			
	Learning terminology & education of DPM			
	Basic knowledge of podiatry			
	Dress code for front desk			
	Inventory and ordering office supplies			
	Help facilitate patient rooming			
File necessary paperwork				
Send reminder, recall and other patient cards when applicable				
Updating patient demographics				

THE CONSULTANT IS IN

Successful (from page 71)

everyone is satisfied that it is meeting expectations, tackle the next.

A “start-up” front desk checklist should get you on the right foot. Add any missing steps particular to

your office. Evaluate and rearrange items based on importance/result, follow through, and stick to it. Keep in mind that many of these tasks will require numerous additional action steps.

Bad News/Good News. “*When does improvement end?*” you ask. That would be: never. Any homeowner knows that for a fact. There is always something that needs to be done and always something more you can do to improve things. Whether it’s a critical fix or superficial niceties, processes, appearance, efficiency, cost

containment, or simple maintenance. Optimal functionality is achievable. As the saying goes, “plan the work and work the plan”. *Consistent* planning and *consistent* hard work make the difference.

If anyone would like a .pdf version of this checklist, please email me at lynn@soshms.com. **PM**



Ms. Lynn Homisak, President of SOS Healthcare Management Solutions, carries a Certificate in Human Resource Studies from Cornell University School of Industry and Labor Relations. She is the

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