

GOAL DRIVEN PRACTICE MANAGER JOB CHECKLIST

GENERAL DESCRIPTION

The role of Practice Manager is usually part-time. It can take anywhere from 5 to 25 hours extra per week, depending on the size of the practice and the duties assumed. The manager's duties generally fall outside of other departments, such as the Front Desk or Patient Accounts.



Greater Goals: MISSION

1. To help the office achieve its mission by ensuring that all policies and procedures are performed expertly, routinely, and regularly improved.
2. Help each team member improve their performance in their assigned roles.
3. Assist the CEO directly by keeping them informed on vital information, relieving the CEO of tasks, and delegating them to others.
4. Ensure that practical future projects are completed.
5. Create an environment where patients feel competently cared for and staff can work in harmony as a team.

Tangible Goals: OUTCOMES

1. A practice that is moving towards its goals.
2. A happy and solvent office that is smoothly running and following office procedures.
3. Professional team members that are improving and becoming experts.
4. Very satisfied patients who are becoming relieved of pain, whose health is improving, and who are learning how to better improve their health.
5. Satisfied doctors and business owner(s).

PERFORMANCE MONITORS

- General office statistics, such as new patients, office visits, collections, etc.
- Projects completed on time.
- Percent of policies and procedures always in use.


PERFORMANCE EXPECTATIONS

The manager should work closely with the team and the CEO to continually improve the office. They should have a good rapport with everyone, helping and coaching both staff and doctors to improve their application of administrative procedures. As a coach, they must be willing to help keep policies followed, procedures done expertly, and each team member doing their best to achieve the goals of the office. All this should result in the office volume increasing and moving towards its full capacity and mission.

Practice Manager Checklist

This is a SAMPLE checklist. Edit and add your own MIP's – *Most Important Procedures* that produce the biggest results! This checklist starts out with monthly duties, then weekly and then daily. This corresponds to a monthly improvement cycle as covered in the Goal Driven System. Last are quarterly and yearly duties.

Assessment Date: _____ Assessment Done by: _____

1.	OM Role. Ensure that owner/CEO is aware of office manager position and agrees to its duties as listed herein, and the necessary amount of time is allotted each week to perform the functions stated in this job description.	
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MONTHLY					
Fill In → A = Always, M = Most of the time, S = Some of the time, N = Not this time		A	M	S	N
		○	◐	◑	⊗
2.	Monthly Management Meeting with CEO. Review the prior month and preview what needs to be accomplished for the next month with your Clinic Director before your monthly team meeting.	○	◐	◑	⊗
3.	Monthly Management Meeting with the team. Team Meetings and the Lab. Meetings are for improvement. This is where you get to work ON the business, not just in it. This is your Improvement and GOALS LAB. Use meetings for communication, coordination, and training. They can be very useful if done correctly. Everyone comes prepared and contributes. Use the Goals Achievement Process. Review prior month, set new goals for the new month with action steps to achieve them.	○	◐	◑	⊗
4.	Monthly Meeting of Support Professionals. <i>As needed</i> , review prior month and discuss areas for improvement, rehearse and train on procedures and set goals.	○	◐	◑	⊗
5.	Monthly Meeting of Clinical Professionals. <i>As needed</i> , review prior month and discuss areas for improvement, rehearse and train on procedures and set goals.	○	◐	◑	⊗
6.	Doctor Meetings – Encourage and help the doctors to meet at least monthly to review cases, protocols, techniques, and other clinical subjects.	○	◐	◑	⊗
7.	Coaching Reviews. Meet with each employee for a coaching review --- weekly for new employees and monthly for existing employees.	○	◐	◑	⊗
8.	Study/Train – Ensure team training and individual training occurred as needed.	○	◐	◑	⊗
9.	Staff Schedules. Ensures that staff scheduling, and vacation times are coordinated with staff and doctors in accordance with office policy.	○	◐	◑	⊗
10.	Practice Playbook. Ensure that employee job and policy manuals are current	○	◐	◑	⊗
11.	New Department and Clinic Policies. Update Job Checklists, Department Policies and Procedures, and office-wide policies in Office Playbook and keep in a location team members can review.	○	◐	◑	⊗
12.	Pt Accounts. Review AR of Patient Accounts, with or without the CEO, and report findings and action steps to CEO.	○	◐	◑	⊗
13.	Recruiting. Recruit Qualified Team Member as needed and as approved by CEO.	○	◐	◑	⊗
14.	Terminating – Terminate employee as needed and as approved by CEO.	○	◐	◑	⊗
15.	Supplies and Products. Ensure that all supplies and products are ordered, inventoried, and neatly put away.	○	◐	◑	⊗

MONTHLY					
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		<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
16.	Proposals. Submits proposal, or has staff submit a proposal form, for any major changes or requests for equipment or funds.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
17.	Special Projects. On occasion, help the CEO with special projects, time permitting. Projects are a series of action steps with a completion date which is designed to implement a new or one-time procedure. These are sometimes of a promotional nature, such as "put on our annual food drive", "Research and submit a purchase order for clinic shirts," or "Implement New Patient Education Procedures ", or a new computer program.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

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WEEKLY		<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
1.	Weekly Team Meeting. Follow up on monthly action steps	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
2.	CEO management meeting. Meet with the CEO at the end of each week and review how it went and preview the upcoming week.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
3.	Capture work from CEO and delegate to others as needed.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
4.	Delegate. Delegate work to other staff when necessary, with the approval of the CEO if appropriate. Add duties to appropriate job checklist.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
5.	Statistics. Sees that daily, weekly, and monthly stats are compiled and reported. Know what they are.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
6.	Communication. Ensures that good communication exists between <u>all</u> staff and Doctor(s). Makes sure that any misunderstandings are corrected as soon as possible.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
7.	NP Intake. See that the new patient and reactivated patient intake procedures are effectively and correctly done.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
8.	Regular Patients. See that the regular patient and maintenance patient procedures are effectively and correctly executed, such as re-exams, post reports, re-exams, re-reports, final post report and conversion to wellness programs.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
9.	Help the team. Where needed, supports team efforts.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
10.	Log Jams. Locate log jams or “capacity constraints” in patient, paper, and employee flow and improve the flow. (This might become part of a monthly plan.)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
11.	Work with each department. Check in with each department to see how they are doing on their monthly goals.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	• Front Desk	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	• Doctors	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	• Rehab	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	• Massage	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	• Patient Financials	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	• Billing and Collections, Patient Accounts	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	• Marketing	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
12.	Refer to Playbook. Refer staff questions, confusions, or difficulties to the Practice Playbook. This keeps things constant and predictable.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
13.					
14.					
15.					

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		<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
DAILY DUTIES					
1.	Mission. Keep all team members focused on, excited about, and working toward the office mission.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
2.	Know the score. Each day, know the scoreboard – the status of the Key Performance Indicators, including daily and weekly: Income, Visits, New Patients.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
3.	Know progress towards the monthly goals. Is the business on track to reach its monthly goals, or falling behind? (Use of Goal Graphs can help.)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
4.	“THE 5 MINUTE BRIEFING.” Meet with the owner/CEO every day for about 5 minutes and brief them on the clinic statistics, relevant and important information, and the status of important improvement projects. Check to see if they have any office concerns and note these to work on and report on at the next Briefing.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
5.	Short term improvement. Determine the cause of any short-term (daily/wkly) increase or decrease in the numbers and establish 2-3 action steps to support the increase or remedy the decrease.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
6.	Urgent issues. Face any urgent and important issues and work out solutions. Do not be distracted by unimportant issues masquerading as important.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
7.	Fill in. If a staff member is not at work, it is the office manager’s responsibility to see that this vacancy is filled, either by the OM or someone he or she delegates	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
8.	Check on each department. Policy and procedures? Patients happy and the flow smooth? Team Members lively and on task? Good atmosphere? Support where needed.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	• Front Desk	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	• Doctors	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	• Rehab	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	• Massage	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	• Patient Financials	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	• Billing and Collections, Patient Accounts	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	• Marketing	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	• CEO/Owner	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
9.	Case management. Beginning of the Day “Case Management Meetings” with doctors and team.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
10.	Work on weekly and monthly action steps that are important, but not urgent.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
11.	Clinic cleanliness. Ensure that the clinic is neat and clean and well equipped with supplies, from bathrooms to treatment rooms.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

		A	M	S	N
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Quarterly		<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
1.	Compliance. Every 3 months do a thorough review of our compliance with the regulations of HIPAA, Medicaid/Medicare, OSHA, and any other agencies which we need to comply with their guidelines. LAST REVIEW: _____	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
2.	Checklist Review: Pt Account Checklist. Assess Pt Accounts checks to ensure all procedures are being done. This includes new patient data entry, patient financial consultation (post report), insurance verification, claims submission and follow-up.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
3.	Checklist Review: Front Desk Checklist. Review the front desk checklist with the Front Desk Coordinator and assess each procedure to ensure that they are all being done. Suggest improvements as needed.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
4.	Checklist Review: Therapy Checklist. Review the therapy checklist with the therapy rehab team and assess each procedure to ensure that they are all being done. Suggest improvements as needed.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
5.	Checklist Review: Marketing Checklist. Review the marketing checklist with the CEO and team and assess each procedure to ensure that they are all being done. Suggest improvements as needed.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
6.	Checklist Review: Doctor/Provider Checklist. Review the administrative functions of the doctors and other providers according to their checklist. Suggest improvements as needed.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Yearly					
1.	Review End of Year Checklist with the CEO. Ensure that all actions are completed. Stay on it until the checklist items are completed.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
2.	Individual Team Member Development Plan. Meet with each team member and set up their training and improvement actions for the year. Review this after 6 months and update.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>