

Creating Staff Procedures

This is either the best asset you have or the greatest problem you have - and it's all your fault!

It will take some time but if you want to improve this area of your practice you will have to do a few difficult things.

1. Examine, watch, overhear and generally observe each of your staff in their daily activity. Try to do this unobtrusively (hide behind doors, stand off to the side doing paperwork and DON'T LOOK). Take a 1 to 2 weeks to do this. Get to know what they do well or wrong but GET TO KNOW WHAT THEY ACTUALLY DO!
2. On your own, in private, make a list of what each staff person actually does. Try to list as many things as possible. Don't say "Greet the patient". Break it down into separately unique steps. (She smiles, asks how they are feeling, has them sign in, tells them to sit down until called.)
3. Begin to review each individual step. Do you want her to ask how the patient is doing and by doing so direct the patient to dwell on their pain? Do you want her to collect the money before the patient sits down?
4. Develop specific step by step procedures for each group of actions. (Greeting the patient, Collecting the money, Setting the next appointment, etc.)
5. Now separate the jobs from the people and begin to put groups of actions together based, not based on when, but based on who or with what other activity it is best grouped. Now try to fit each grouped action to particular personality traits that should be beneficial (outgoing - greeting and signing patients in, detailed - setting appointments, tenacious and direct - collecting money, etc.)
6. Begin to get a feel for what traits best go with what positions in the practice and who of your staff are best suited for them.
7. Once you have a solid feel or conception of who is best suited for each activity try to figure out when an individual can perform it along with the other activities in a smooth organized process, step by step from first seeing the patient until the end. The two most important keys to this process is to focus on Key important actions and their associated traits and the reduction of time a changed process may provide. You don't want the friendliest person to have to be in 3 places at once and get back to the patient 4 different times. See if you can group those activities together some how. You'll find that a reorganization of your practice this way can improve your efficiency, speed, collections and reduce the stress and expense.
8. Now it's time to ASK the staff for their input to fine tune it. They have to know why you're doing this and what their benefit will be. No one likes every step but without their input you will find stress and disagreement developing. Everyone has to buy into the common goals. With their help you may find that they have good suggestions or will give insight into why your great idea won't work. Give them credit where due. They deserve and desire that.
9. Now do some practice runs over a week or two during non-patient time having everyone pretend to be a patient to see how it will work. Once everyone is comfortable with the changes you can begin using it. Try using it ONLY in the morning or afternoon at first before you go to the whole day. There will still be some bugs to work out.
10. Somewhere in this process you should write each activity and it's individual steps down in detail to create a Procedure Manual. This manual will be invaluable when you hire a new staff person and don't have time to train them fully. Break the activities into groups of critically important, important, everyone should know, and specific positions should know. Create a list of which ones you want to be learned before you go beyond their trial employment period, get their first raise, get a bonus, etc. EVERYONE including all the doctors and office manager must be passed by someone else on each procedure. Once they're passed they can be a tester for new personnel.