

MANAGEMENT SOPS BOOK
Table of Contents

SECTION I	
New Employees	Placing An Ad (How To Call In, On Line Advertising, Samples, Etc)
<i>The first 9 tasks include information and forms from Bent's book however they need to be customized and sopified for how you use them.</i>	Application Process (Forms And How To Analyze Them)
	Screening Applicants On The Telephone (Questions To Ask)
	Interviewing Job Applicants (Who And How, Documentation)
	Checking References (Form To Use, Questions To Ask)
	Orientation Day
	Creating A Personnel File
	Counseling Employees
	Written And Verbal Warnings (When, How, Examples)
	Decision Process (How To Notify New Hire And Those Not Hired)
	Training Schedule For Business Office
	Training Schedule For Clinical Area
	90 Day Evaluation

SECTION II	
Staff Management	Annual Performance Reviews
	Job Descriptions (When To Update Or Change, How To Use)
	Task Inventories (When To Update Or Change, How To Use)
	Staff Work Schedules
	Maternity Leave
	Other Leaves Of Absences
	Work Injuries
	Requesting Time Off
	Tracking Attendance (Stated Standard, Form Used, Counseling)
	Giving Feedback (Please Let's Sheet)
	Staff Shortages (Changes In Operations, Temporary Help)
	Supervising Clinical Staff (Patient Flow, Task Assignments)
	Supervising Business Staff (Daily Goals, Task Assignments)
	Clinical Monitor/Patient Flow (How To Document, Analyze)
	Documentation Of Incidents
	Requests For Job Reference
	Enforcement Of Code Of Conduct
	Providing References For Previous Employees

SECTION III	
Staff Motivation	Team Vote
	Incentive Program
	Staff Praise And Recognition
	Holiday Celebrations And Group Events
	Creating A Team Agreement

SECTION IV	
Operations	Setting Up The Computer W/ Treatment Days, Dr. Hyg, Sealant, IV
	Managing Recall
	Chart Audit
	Recall System Effectiveness
	Office Security Check List
	Computer Operations: Updates Back-Up, Trouble Shooting
	Managing Patient Finances
	Making Collections A Team Approach
	Monitoring Sheets
	Managing Dental Supply Cash Flow
	Saving On General Office Supplies
	Communicating With The Special Needs Patient
	Office Layout: Diagrams
	Inventory Control
	Iv Days
	Hospital Cases
	Telephone System
	Answering Service

SECTION V	
Meetings	Morning Huddles
	Staff Meetings (Prep, Agenda, Facilitation)
	Staff Meeting Notes
	Managing Staff Meeting Action Steps
	Management Meetings
	Consultant Training Days

SECTION VI	
Administrative	Benefits Admin (Med Ins, Retirement, Vacation, Sick Time, Etc)
	Updating And Implementing New Fees
	Workers Comp
	Malpractice Ins.
	Processing Mail
	Continuing Education
	Convention Attendance
	All Monitors, Logs, And Necessary Documentation
	Licensing And Other Requirements
	Magazine Subscriptions
	Correspondence
	Liaison With Advisors
	Monthly Reports To Consultant And Other Advisors

SECTION VII	
Financial Management	Office Financial Policies And Options
	Processing Payroll
	Issuing Refunds
	Credit Balance
	Monthly Computer Reports
	Production Goals And Scheduling Protocols (Mgt Prospective)
	Processing Invoices
	Accounts Receivable Management
	Collection Activities
	Ordering Supplies
	Budget Objectives
	Banking Protocols (Deposits, Phone Calls, Etc)

SECTION VIII	
Communication Protocols	Inner Office Memo System
	After Hour Calls To Doctor (When Is It Appropriate, What #, Etc)
	Emergency Contacts
	Calls For Dr. (Who Gets Through, Your Communication Role)
	Documentation
	Use Of Internet And Email By Staff

SECTION IX	
Advisors and Vendors	List With Names And Contact Information (Who To Call For What)
	Mailing Reports

SECTION X	
Conflict Resolution	Agreed Upon Techniques And Verbal Skills
	Facilitating Discussion
	When To Call For Help Or Involve Dr. Chin

SECTION XI	
Promotion & Marketing	Gifts To Patients And Referring Doctors
	Educational Material
	Holiday Decorations
	Tracking Referrals
	Progressive Thank You For Referrals
	Nine Moments Analysis And Customer Service Goals
	Patient Satisfaction Surveys
	Dazzle Cards

SECTION XII	
Regulatory Compliance	OSHA
	HIPAA (see separate section)
	Fire Marshall Safety

SECTION XIII	
Facility Management	Janitorial
	Repair And Maintenance
	Equipment Maintenance
	Storage Management

SECTION XIV	
Parent Issues and Difficult Situations	Dismissing A Patient
	Managing Upset Patients
<i>Create this section as questions are asked and answered.</i>	Consent For Treatment
	Financial Options And Policies
	Divorce Situations
	Transfer Of Records

SECTION XV	
Referring Offices	Sending Records And X-Rays
Requests and Questions	Financial Information (Do Not Share)

SECTION XVI	
Total Quality Management	Sops Updates
	Complaint Logs
	Satisfaction Surveys
	Analyzing Incentive Sheets

SECTION XVII	
HIPPA	Communicating Privacy Practices To Our Patients
	When An Authorization Is Needed
	Patient Revocation Of Authorization
	Verification Of Identity
	Applying The Minimum Necessary Standard
	Business Associate Agreements
	Staff Training Of Privacy Policies And Procedures
	Discipline And Sanctions For Violations Of Privacy Policies
	Patient Complaints
	Right To Access
	Request To Amend Record
	Accounting For Disclosures
	Disclosures Log

	Request For Restrictions On Use Or Disclosure
	Request For Alternative/Confidential Communications
	Faxing
	Email
	Summary Of Computer Programs
	Virus And Hacker Protections
	Paper Records Handling And Storage