

**Practical Practice Management**  
Office Overview

Tell me about your practice:	Yes	No
All positions have written job descriptions		
Has a protocol manual for both front and back office		
Holds regularly scheduled office meetings		
Has an office employee manual		
Has an active office manager		
Has a training program for both front and back office assistants		
Does billing in-house on a daily basis		
Has a billing service		
Scheduling protocol and runs on time 90% of the time		
Collections are done daily and A/R is under control		
Has protocol for regular employee reviews		
Has a progressive discipline policy in place		
Training for HIPAA compliance and has a compliance manager		
Training for OSHA and is OSHA compliant		
Has an EMR system and is a paperless office		
Collects all copayments and deductibles at time of visit		
Has a financial policy and each patient has signed one		
Has a system to track where referrals are coming from		
Has an active outside marketing plan		
Has an active website and social media sites		
Has an active internal marketing system in place		
Staff members have been trained in risk management		
Staff members are professional and have a professional appearance		
Has a high staff turnover		
Has staff communication problems		
Practice runs efficiently		
Practice continues to grow in patient numbers and revenue		
Practice correct number of staff personnel to run practice efficiently		
Staff are motivated to take practice to next level		
Staff are open to changes in the practice		
Office environment is healthy and all staff (including physician) are happy.		

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Or fax to: 707-578-8348

Your Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_