

Is Your Office Manager Watching Your Back?



Is your office manager setting the example for others to follow? Monitoring practice reports and sending out statements regularly? Managing employees effectively? Keeping you compliant with state and federal regulations and keeping your credentials up to date?

What do we mean by watching your back? A good office manager has the mindset that she is an extension of the doctor and is vested in the success of the practice. Doctors should realize they are putting their financial security and future in the hands of their office manager and should choose this person wisely. In today's economic climate with continuation of decreased fees from insurance companies and the unknown consequences of the Affordable Care Act, you must have a strong and effective office manager to run your practice efficiently. Practice profit margins are shrinking in many areas of the country and more than ever a doctor needs help in running their practice like a business. Excellent patient care should still be the number-one priority; however, as time goes by, there will be less and less margin for sloppiness and inefficiencies, if profit margins are to be maintained. Your office manager may be a person you trust, just make sure they have your back and can really do the job you need them to do. You may have the right person, but they might need more training, or you may have the wrong person who can cost you tens of thousands of dollars. You decide.

Your Office Manager Should Set These Examples

- Sets clear expectations for the employees, upholds the practice mission statement, is diligent about completing the doctor's requests, is trustworthy, is loyal and looks professional.
- Arrives on time and works until the last patient leaves and sees that all duties for the day are completed, treats the staff fairly and equally, does not play favorites, holds the team accountable for their responsibilities, is conscientious of her relationships with each team member and how it affects her respectability. An ambassador for the practice who refers patients to the practice by speaking highly of the doctor and team internally and externally. Invested in the success of the practice. Arrives every day with a positive attitude – it can be contagious.
- Always has your back.

What Every Effective Manager Must Be Able To Do

- Be actively involved in holding the employees accountable for performing their job duties. The office manager is the watchful eye to catch anything that may not coincide with your office mission statement, or philosophy. For example, we discovered in one office, employees clocked in on one computer and clocked out on another. When the office manager asked why this was taking place she found out that one computer was fast and one was slow and additional paid time was created. Instead of rectifying the situation the

office manager followed suit. The dishonest behavior continued until it was discovered and exposed by a new employee who informed the doctor.

- Address inappropriate behavior promptly so it does not continue; i.e., tardiness, absenteeism, moodiness, poor job performance, poor appearance.
- Competent in creating a "written request for job performance change" and feels confident in having this type of conversation with employees. Then, follows up on the requested behavior change to help coach it to success. If the employee is not making the changes, be proactive in writing another warning, and discussing the issue again with the employee to ensure there is a good paper trail if the employee has to be let go.
- Knows how to lead without the use of yelling, demands or intimidation.
- Can take the 6 a.m. calls and text messages from your employees who will not be able to come into work that day. Manages time off requests and mediates interpersonal issues between team members.
- Is courteous and approachable with your patients and team members with any issues or concerns.

Reports That Should Be Monitored Regularly

Dental software can do just about everything except treat the patient. The key is knowing how to capitalize



on the different reports the software is capable of producing. By regularly reviewing these reports and using the information, your practice will operate more efficiently. The following is a list of some of the major reports your office manager should be running and you reviewing.

- **Day sheet.** Printed daily and reviewed to make sure all services are included and have been correctly billed out to the insurance company. Practice revenue is lost when additional procedures completed on the patient are not communicated to the front desk staff before the patient checks out.
- **Daily deposit report.** Your daily bank account should reflect the same amounts on the deposit slip. Often times with electronic fund transfers (EFT) it is hard to track if the money that was deposited into your bank account was entered into patient accounts in your software. Make sure that each day your bank account deposits match the amounts on your previous daily deposit slip. That means that all EFT payments, credit card charges, checks, cash and Care Credit payments need to be entered into the software the day they are received. You should go online and log in to your bank account in the morning and let your staff know what EFT payments arrived and if the credit card amounts that were settled the evening before match.
- **Unpaid claims report.** The average office has to adjust off thousands of dollars each year on claims that the insurance carrier denied because they were not submitted within the time limit for payment. The unpaid claims report should be worked weekly to ensure that claims are paid in a timely manner or re-submitted for payment with corrected information if necessary.
- **Procedures not attached to insurance claims.** This report will show all procedures that were never submitted to insurance for payment. These procedures should be submitted for payment immediately.
- **Secondary insurance report.** Many offices also lose money by not submitting the secondary claims. Even if the primary insurance company paid 100 percent, you still should submit to the secondary insurance. In some cases where the primary is a PPO and the secondary is a traditional indemnity, there is a possibility for additional payments on those services up to your Usual, Customary and Reasonable (UCR) fees.

- **Unscheduled treatment plans, broken appointments and past due recall reports.** Don't let your patients get lost. This is an untapped potential of revenues to quickly fill your schedules and create production. These reports should be printed monthly and your office manager should assign a team member who will be accountable for working these reports and tracking their results.
- **New patient referral report.** Review monthly with the marketing team and decide on appropriate marketing actions to take place in the next month.
- **Good exercise.** Ask your office manager which reports are currently being utilized and if all team members know how to print these reports and turn them into scheduled appointments.
- **Statements should be sent out regularly.** Often times when an office manager is overwhelmed, one of the first things to suffer is collections because statements are not being sent regularly. Your office manager might only be sending statements on the first of every month and hoping the patient pays. We have found it to be more effective to send statements daily. Do this by selecting all accounts with a balance that has not received a statement within the last 21 days. This will also cover all balances after insurance payments have been posted. This is much easier than processing individual statements each time a balance is left after a claim has been paid.

Compliant With Regulations

- Many states require labor laws be posted. Additional postings specifically for the dental office may be required in your state. There are other things that may be required such as pay date postings of what to do in case of injury on the job.
- What about signed consents? Do you know what the requirements are and how often they need to be updated? Does your office manager know what the laws are in your state regarding spore testing? It must be documented that the test was done and that your sterilization process is up to standards mandated in your state.

Keeping Your Credentials Up To Date

- W9s, declaration pages from the insurance companies, CPR cards, DEA Licenses, and dental licenses are a lot to keep track of, and there are penalties if these expire.



-
- Insurance companies often send reminders that get discarded without a glance. Your office manager should be sending in the required paperwork to keep you compliant with your contract ensuring the doctors in the practice are appropriately credentialed with the insurance companies. We know of practices whose office manager did not correctly complete the new associate doctors credentialing and for six months this doctor completed work for which the practice could not get paid.

We recommend the doctor and office manager have a weekly management meeting to help them stay on task with keeping new projects moving forward and review the current status of producer (restorative/recall/hospital) production, collection and new patient goals, marketing actions and staff issues. This meeting is effective in keeping the co-leadership unified. Also, quarterly, a doctor should discuss his practice vision with his office manager and how he feels it is being achieved. This will help the office manager have a clear picture of what the doctor is working towards.

“The true value of any business leader and manager is performance.”

Brian Trac

**Does Your Office Manager Need a Tune Up?
Give her the training to succeed...Call us today!**

We will help her...

- use dental software reports to increase production and collection
- be an effective leader and hold staff accountable
- use communication technology to maximize patient contact and referral opportunities

JULIE WEIR
& ASSOCIATES
TAKE *the* LEAD

Full Service Practice Management Consulting Specializing in Pediatric Dentistry since 1996

Consulting * Marketing * Success Products * Speaker * 303-660-4390 * www.julieweir.com



american academy of pediatric dentistry
211 east chicago avenue, suite 1700,
chicago, illinois 60611-2637



Published four times per year
as a direct membership benefit
by the American Academy of
Pediatric Dentistry (AAPD), 211
East Chicago Avenue, Suite
1700, Chicago, IL 60611-2637,

(312) 337-2169. Copyright©2013 by the AAPD.
All rights reserved. ISSN 1064-1203. [aapdinfo@
aapd.org](mailto:aapdinfo@aapd.org), www.aapd.org. Writer: Julie Weir has built
an outstanding reputation as a consultant, interna-
tional speaker and author in the business of denti-
stry. Opinions and recommendations are those of the
author and should not be considered AAPD policy.
Chief executive officer: Dr. John S. Rutkauskas;
Publications Manager: Cindy Hansen; and Publications
Coordinator: Adriana Loaza.

