



Photo by Emma Matthews at Unsplash

**ORGANIZE &
SUCCEED**

April Thompson
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WEEKLY MANAGEMENT SYSTEMS



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Introduction

A speaker at an ADA Conference in Boston MA described a dental administrator to me as a “schizophrenic octopus”. I knew what she meant. I felt it. I was a newbie in the world of dentistry and 28 years old. I needed help and knew it.

Keeping the octopus in my job description was essential for me. After all, an octopus has 6 arms and 2 legs. It also has a highly advanced brain with great problem-solving skills. Additionally, an octopus has 3 hearts!

The dental field involves caring for people. In caring for people, having 3 hearts could only be a good thing! But I wondered how to take the schizophrenic feeling out of my day.

Fast forward to now, and it is 25 years later. The answer for me has been organization. Organization combined with proven systems and procedures has calmed the seas for me.

This manual has been written to help bring some calmer seas for your sailing pleasure. Here, you will find tasks to be accomplished daily, weekly, and monthly to help meet everyone's goals and expectations.

Inside, please find that each month is broken into weekly time segments. Within each week are daily segments and tasks. I have not included every task that is to be done in a day, not even close! It assumes every day tasks such as answering phones, treatment planning, blocked scheduling, patient care, etc. are being done.

E-books are available at asthedrillturns.com to further assist with detailed applications.

This manual is based on a 4-day work week. It can be adjusted to suit a 3 or 5-day work week. Worksheets are included to help you customize and organize!

Smooth Sailing!

“Everything must be as simple as possible. But not simpler.” Albert Einstein

Week 1

First Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Review Weekly Schedule for Production Goals
- ✓ Fill Any Appointment Openings With Production Goals In Mind
- ✓ Post All Payments Received by Mail & Electronically
- ✓ ***This First Day is Usually Quite Full of Activity/Survival Mode***
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced

Second Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Continue To Monitor & Adjust Weekly Production To Meet Goals
- ✓ Post All Payments Received by Mail & Electronically
- ✓ ***Run Reports For All Patient Balances Over 30 Days & Address***
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced

Third Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Continue To Monitor & Adjust Weekly Production to Meet Goals
- ✓ Post All Payments Received by Mail & Electronically
- ✓ **Run Insurance Ageing Report for All Claims Over 90 Days & Address**
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced

Fourth Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Continue To Monitor & Adjust Weekly Production to Meet Goals
- ✓ Post All Payments Received by Mail & Electronically
- ✓ **Run Continuing Care Report for All Patients Due Now & Contact**
- ✓ **Run New Patient List For This Week & Update/Correct**
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced

Week 2

First Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Review Weekly Schedule for Production Goals
- ✓ Fill Any Appointment Openings With Production Goals In Mind
- ✓ Post All Payments Received by Mail & Electronically
- ✓ ***This First Day is Usually Quite Full of Activity/Survival Mode***
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced

Second Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Continue To Monitor & Adjust Weekly Production To Meet Goals
- ✓ Post All Payments Received by Mail & Electronically
- ✓ ***Run Reports For All Patient Balances Over 60 Days & Address***
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced

Third Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Continue To Monitor & Adjust Weekly Production to Meet Goals
- ✓ Post All Payments Received by Mail & Electronically
- ✓ **Run Insurance Ageing Report for All Claims Over 60 Days & Address**
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced

Fourth Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Continue To Monitor & Adjust Weekly Production to Meet Goals
- ✓ Post All Payments Received by Mail & Electronically
- ✓ **Run Continuing Care Report for All Patients Due Over 30 Days & Contact**
- ✓ **Run New Patient List For This Week & Update/Correct**
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced

Week 3

First Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Review Weekly Schedule for Production Goals
- ✓ Fill Any Appointment Openings With Production Goals In Mind
- ✓ Post All Payments Received by Mail & Electronically
- ✓ ***This First Day is Usually Quite Full of Activity/Survival Mode***
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced

Second Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Continue To Monitor & Adjust Weekly Production To Meet Goals
- ✓ Post All Payments Received by Mail & Electronically
- ✓ ***Run Reports For All Patient Balances Over 90 Days & Address***
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced

Third Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Continue To Monitor & Adjust Weekly Production to Meet Goals
- ✓ Post All Payments Received by Mail & Electronically
- ✓ **Run Insurance Ageing Report for All Claims Over 30 Days & Address**
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced

Fourth Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Continue To Monitor & Adjust Weekly Production to Meet Goals
- ✓ Post All Payments Received by Mail & Electronically
- ✓ **Run Continuing Care Report for All Patients Due Over 60 Days & Contact**
- ✓ **Run New Patient List For This Week & Update/Correct**
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced
- ✓

Week 4

First Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Review Weekly Schedule for Production Goals
- ✓ Fill Any Appointment Openings With Production Goals In Mind
- ✓ Post All Payments Received by Mail & Electronically
- ✓ ***This First Day is Usually Quite Full of Activity/Survival Mode***
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced

Second Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Continue To Monitor & Adjust Weekly Production To Meet Goals
- ✓ Post All Payments Received by Mail & Electronically
- ✓ Run Patient Ageing Report For All Patients Over 30 days For Final Numbers
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced

Third Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Continue To Monitor & Adjust Weekly Production to Meet Goals
- ✓ Post All Payments Received by Mail & Electronically
- ✓ **Run Insurance Ageing For All Claims Over 30 For Final Numbers**
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced

Fourth Day in the Office

- ✓ Answer All Messages Left During Time Closed
- ✓ Confirm 2 Days Out From Today
- ✓ Continue To Monitor & Adjust Weekly Production to Meet Goals
- ✓ Post All Payments Received by Mail & Electronically
- ✓ **Run Continuing Care Report for All Patients Due Over 90 Days & Contact**
- ✓ **Run New Patient List For This Week & Update/Correct for Monthly Totals**
- ✓ Send All Insurance Claims For The Day
- ✓ Run Billing Statements Once Day is Balanced

Customize Your Daily/Weekly Systems

I realize that your role and responsibilities are quite individual.

Your title might be “Office Manager, Treatment Coordinator, Hygiene Coordinator, Surgical Coordinator, Implant Coordinator.. etc.”

Take the time to write down what your individual tasks include:

What needs to be done every day?

What needs to get done in a month?

How can you break those down into weekly/daily tasks and what days will you do which task?

No one knows your day better than you!

Begin with the end in mind. Start with listing any monthly tasks that must be completed, and work backwards.

Your “How To” begins on the next page.

You've got this!

Let me know if I can help.

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My Weekly Management System

Monthly Tasks:

Now break it down into weekly segments:

Week 1:

Week 2:

Week 3:

Week 4:

Now break it down into daily segments:

Day 1:

Day 2:

Day 3:

Day 4:

Notes:



(photo by Judson Moore on Unsplash)

“Talent without discipline is like an octopus on roller skates. There’s plenty of movement, but you never know if it’s going to be forward, backwards, or sideways.”

H. Jackson Brown, Jr.

