
Business Office/Doctor Meeting Agenda

✓ Initial Meeting Agenda

Business Office Mission Statement and Management
Communication with Specialists: Perio, Endo, Ortho, etc.
Marketing Projects - printing, newsletter, etc.
New Patient Process and Communication
Schedule Weekly/Monthly Meetings
Continuing Education Needs

✓ Weekly: 15-30 minutes

Weekly Agenda:

1. Schedule
 - a) Production goal
 - b) Time units/pre-blocks
 - c) Emergencies
 - d) Broken/Canceled appointments

2. Collection and Financial Arrangements
 - a) Collection 97%-98% of production
 - b) Accounts receivable ratio: less than or equal to one month of production
 - c) Over-the-counter collections 30%-40% of total collections
 - d) Over 90 day accounts less than 15% of total A/R
 - e) Uncollectible balances, less than 2.5% of total Production

3. Treatment planning
 - a) Updates/changes
 - b) Incomplete
 - c) Delayed
 - d) Phase 2 starts

4. New patient follow-up
 - a) Thank-you notes
 - b) Welcome packs
 - c) Pending treatment presentations

Business Office/Doctor Meeting Agenda - continued . . .

5. General correspondence

✓ Monthly: 30 minutes

End of the Month Agenda:

1. Monitor review - Practice Vital Signs
 - a) Broken/Canceled appointments (BA/CA appointment report)
 - b) Overdue recall (recall report)

2. Aged accounts receivable
 - a) Outstanding insurance (pending insurance report)
 - b) 30-60-90 day patient balances (outstanding balances report)
 - c) Adjustments (adjustment report)

3. New patient monitor
 - a) Treatment acceptance (incomplete treatment report)
 - b) Referral sources (referral report)

4. Action Plan items

Department Meeting

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Dental Practice Management & Marketing Excellence

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Hygiene/Doctor Meeting Agenda

✓ Initial Meeting Agenda

Hygiene Mission and Management
Initial Perio Therapy Program implementation
Communication with specialists: Perio, Ortho, etc.
Marketing projects - printing, etc.
Protocol issues
Schedule weekly/monthly meetings
Continuing education needs

✓ Weekly: 15-30 minutes

Weekly Agenda:

1. Progress of patients in Perio Program - bring charts and non-surgical perio therapy monitor.
2. Outstanding Continuing Care patients - bring daily schedules and overdue recall report, incomplete treatment report, referral report and the broken and canceled appointment report.
3. Doctor exam management, scheduling, monitor checks, etc.

✓ Monthly: 30-60 minutes

End of the Month Agenda:

1. Monitor review
 - daily production
 - adherence to departmental protocol
 - broken and canceled appointments
 - number of patients seen each day
2. Hygiene Daily Monitor Summary
3. Action Plan Items

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Clinical Assistant/Doctor Meeting Agenda

✓ Initial Meeting Agenda

Clinical Mission and Management
Communication with laboratory
Protocol issues
Schedule weekly/monthly meetings
Continuing education needs

✓ Weekly: 15-30 minutes

Weekly Agenda:

1. New Patients
 - medical history review
2. Post-Operative Follow-up
3. Schedule
 - time units
 - doctor delegation
4. Emergencies
5. Laboratory
 - review case log
 - returned cases
 - unseated cases

✓ Monthly: 30-60 minutes

End of the Month Agenda:

1. New Patient Tracking
 - treatment planning

Clinical Assistant/Doctor Meeting Agenda - continued . . .

2. Charting
3. Radiology
4. OSHA/Infection Control
 - MSDS, etc.
5. Maintenance
 - checklist review
6. Inventory/Supplies
 - budget
 - shortages
 - par stock
 - new materials

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Clinical Assistant Maintenance Duties

1. Stock Drawers

- A. Everything should be fully stocked on a daily basis.
 - 1. Assistant Drawers:
 - a. Sterilized Instruments
 - b. Supplies
 - 2. Doctor's Drawers:
 - a. Towels
 - b. Supplies
- B. Also include:
 - 1. Plastic cups
 - 2. Tissues
 - 3. Gloves
 - 4. Hand soap

2. Mini-Lab

- A. Clean the lab hand piece with 4x4 and wipe the counter.
- B. Clean model trimmer and vibrator.
- C. Clean the sink and straighten shelves.
- D. Review lab cases:
 - 1. Incoming
 - 2. Outgoing
- E. Fabricate:
 - 1. Mouth guards
 - 2. Bleaching trays
 - 3. Custom trays

3. Lab

- A. Spray the counters with spray foam and wipe down.
- B. Change the towels under the equipment.
- C. This should be done at the beginning of each shift.
- D. Spot vacuum the floor.

4. Garbage

- A. Take the trash cans out from under the sink in the sterilization area.
- B. Change the trash bag.
- C. Go to each room to empty the trash containers into the large trash bag.
- D. Collect the front office trash (under the desks).
- E. Also, gather trash in the bathroom and darkroom.
- F. All of the above should be done at the end of each shift.

Clinical Assistant Maintenance Duties

5. Front Door

- A. Straighten the magazines in the reception area.
- B. Clean the glass on the front door daily with Windex.

6 Bathroom

- A. Make sure the toilet paper, plastic cups, mouth wash, paper towel dispenser, toilet covers, Kleenex, and air freshener are stocked.
- B. Spray the sink with Lysol and wipe it down.
- C. Clean the mirror and paper towel dispenser, as needed.
- D. All of the above should be done at the end of each shift.
- E. Weekly (Thursday or Friday):
 - 1. The bathroom is cleaned thoroughly with spray foam cleaner on the sink and the toilet is cleaned with toilet cleaner.

7. Chemiclave or Autoclave

- A. Daily:
 - 1. The Chemiclave or Autoclave cleaned daily.
- B. Weekly:
 - 1. Drain water, take out trays, and wipe inside of chamber with warm, soapy water ("Speed Clean").
- C. Monthly:
 - 1. Follow directions on "Speed Clean" bottle (use "Packs" cycle when running during cleaning cycle.)

8. Sweep

- A. The porches and outside areas should be swept daily.

9 Traps

- A. At the end of the day, before running suctions, turn on one of the suctions.
- B. Lift up the trap lid.
- C. Take out the filter, empty what you can into the trash.
- D. With a brush labeled, Traps, scrub under running water, to clean.
- E. Wear gloves and protective eyewear.
- F. Clean sink area.

10 Order Supplies

- A. Keep record book up-to-date.

Clinical Assistant Maintenance Duties

11. Run Suction Systems

- A. End of the day, after cleaning traps
- B. After extractions.
- C. Or, as needed.

12. Vacuum

- A. At the end of the day, all rooms (including sterilization, hallways, and the reception area) should be vacuumed.
- B. All carpeted areas every day.
- C. As needed after crown/bridge preps, use a hand vacuum.

13. Trash Holes

- A. They should be wiped out daily with spray foam and wiped down
- B. If necessary, take out and use a spatula to clean out any alginate that hardened.

14. X-Ray Heads, Nitrous Oxide, etc.

- A. Each piece of equipment should be wiped down weekly with spray foam.
- B. Do one (1) each day.

15. Paper Towels

- A. Stock paper towel holders in lab, sterilization area, and consult room.
- B. This is a good time to dust out each holder.

16. Overhead Lamps

- A. Light covers in all procedure rooms need to be cleaned with cleaning solution and soft paper towel, after every patient.

17. Developer

- A. Review video rollers.
- B. Lift the top off and carry the rollers into sterilization area.
- C. Empty, rinse, and dry all containers.
 - 1. Developer; 2. Water; 3. Fixer; 4. Water
- D. Put top back on and make sure the light shield is down (to keep from discoloring the developer).

Clinical Assistant Maintenance Duties

18. Cold Sterile

- A. Change every twenty-eight (28) days.
- B. Rinse all containers.
- C. Make sure all instruments are clean of any cements prior to heat sterilization.

19. Stock Trays

- A. 2x2s
- B. Anesthetic
- C. Needles
- D. Q-tips
- E. Cotton rolls

20. Cement and C&B liners

- A. Change at least once a month.
- B. Use bibs and cut to fit.

21. Wood Railings/Ledges/Window Sills

- A. Dust at least once a week.
- B. Use Pledge and a paper towel.

22. Cobwebs

- A. Use "Webster" to go through the office and remove cobwebs once a week.

23. Plants

- A. Located throughout the front office.
- B. They need to be washed off and then left to dry.
- C. Water when needed.

24. Front Office

- A. File
- B. Answer phone, as necessary.

Things to Do	Monday	Tuesday	Wednesday	Thursday	Friday
Stock Drawers					
Mini - Lab					
Outside - Lab					
Garbage - Afternoon					
Garbage - Evening					
Front Door					
Bathroom - Afternoon					
Bathroom - Evening					
Chemiclave or Autoclave					
Sweep - Porches					
Clean Suction Traps					
Run Suction Systems					
Vacuum					
Trash Holes					
X-Ray Heads, Nitrous - Oxide, etc.					
Order Supplies					
Paper Towels					
Overhead Lamps					
Developer					
Cold Sterile					
Stock Trays					
Cement and C&B liners					
Wood Railings/Ledges/ Window Sills					
Cobwebs					
Plants					
Front Office					

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