

**Position:**

Last updated:



**Daily Routines**

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**Weekly Routines**

<b><u>Monday</u></b>	<b><u>Tuesday</u></b>	<b><u>Wednesday</u></b>	<b><u>Thursday</u></b>	<b><u>Friday</u></b>

**Monthly Routines**

<b><u>Week 1</u></b>	<b><u>Week 2</u></b>	<b><u>Week 3</u></b>	<b><u>Week 4</u></b>	<b><u>Week 5*</u></b>
				*March, June, Sept, Dec

**Annual Routines**

<b><u>Jan:</u></b> <b><u>April:</u></b> <b><u>July:</u></b> <b><u>Oct:</u></b>	<b><u>Feb:</u></b> <b><u>May:</u></b> <b><u>Aug:</u></b> <b><u>Nov:</u></b>	<b><u>March:</u></b> <b><u>June:</u></b> <b><u>Sept:</u></b> <b><u>Dec:</u></b>
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**Position: Practice Manager**

Last updated: April, 2024

**Daily Routines**

Review patient schedule, share feedback Follow up to ensure sick patients with wells that are overdue got scheduled; give feedback as needed Check mail and distribute Review late patient accounts Check email and act on any items requiring attention	Respond to billing service questions Scan mail deposits and ERAs; post to billing service Check lab queue and messages to ensure empty Kitchen duty as assigned
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**Weekly Routines**

<b><u>Monday</u></b>	<b><u>Tuesday</u></b>	<b><u>Wednesday</u></b>	<b><u>Thursday</u></b>	<b><u>Friday</u></b>
Finalize agendas for weekly meetings Review job applications and schedule interviews Update goals dashboard	7:30 am: Meeting with Doctors 9:30 am: Meeting with Office Coordinator 11:30 am: Front desk meeting	Review copay and patient balance reports Give feedback or recognition to front desk for patient collections Review job applications and schedule interviews	11:30 am: Nurses meeting Finalize/post staff assignments for following week Check in with all trainers and new hires	Weekly status email to doctors, including update on progress of goals Review progress on recall list Audit same-day sick visits – any overdue wells? Briefly check in with each staff member to ensure their routines were completed for week

**Monthly Routines**

<b><u>Week 1</u></b>	<b><u>Week 2</u></b>	<b><u>Week 3</u></b>	<b><u>Week 4</u></b>	<b><u>Week 5*</u></b>
Close out/sign off on QuickBooks for previous month	Ensure new hire training plans are all complete Review billing company reports	Complete any new hire 90-day reviews Billing company meeting (Thurs)	Ensure monthly recall list is complete.	Reply to Google ratings Pull 99214/5 usage Blog post published  *March, June, Sept, Dec

**Annual Routines**

<b><u>Jan:</u></b> Set annual goals <b><u>April:</u></b> Review payer contracts <b><u>July:</u></b> Begin health insurance review <b><u>Oct:</u></b> HIPAA training for all	<b><u>Feb:</u></b> Patient satisfaction survey <b><u>May:</u></b> Team satisfaction survey <b><u>Aug:</u></b> Review evergreen contracts <b><u>Nov:</u></b> Post holiday schedule on website	<b><u>March:</u></b> Annual reviews <b><u>June:</u></b> OSHA/risk assessment <b><u>Sept:</u></b> Confirm all trainings are still accurate <b><u>Dec:</u></b> Holiday party
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