Session Goals

- Learn how to create a routines template

- Assign routines to others

- Add new routines with ease

- Clear direction for next week

What we will cover

- What routines are
- Why they are important
- How to track routines
- Create routines for everyone
- Try it!

What are routines?

- Regular activities or behaviors individuals or groups follow consistently
- Provide structure and predictability with a framework that reduces stress and increases efficiency
- Personalized for preferences, needs and goals

Why do you need routines?

"You do not rise to the level of your goals. You fall to the level of your systems."

- James Clear, *Atomic Habits*

What routines do for you

- Promote action
- Reduce stress and free mental space
- Provide better time management
- Create discipline

How to create routines

Step 1: List what you do regularly

Step 2: Determine if it is done daily, weekly, quarterly or annually

Step 3: Determine who executes and who oversees the task

Step 4: Fill out our tool for each role/person

Step 5: Execute

Step 1: List

- Everything that is done regularly
- Everything you would LIKE to be done regularly
- Review the things you learned here that you want to ensure get completed
- Make sure office processes or new processes have a place on your list

Step 2: Determine How Often

- Daily, Weekly, Monthly, Quarterly, Annually

- March, June, September and December have 5 weeks - this is the quarterly assignment

Step 3: Assign Responsibility

- One person "owns" it
- One person oversees it
- As the leader, ensure people communicate with you it has been completed (don't make it your responsibility to seek out the communication)

Step 4: Routines Template

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

Weekly Routines

Monday	Tuesday	Wednesday	Thursday	Friday
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

Week 1	Week 2	Week 3	Week 4	Week 5*
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

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

Step 4: Routines Template (cont'd)

Sections:

- Role and date last updated
- Daily tasks
- Weekly tasks, by day
- Monthly tasks, by week (Wk 5 is quarterly)
- Annual tasks, by month

Step 5: Execute

- Every member of your office team
- Every repeated item should be included
- Every goal you are working towards
- Every leader should have follow up

Let's Try It!

Step 1: List what you do regularly

Step 2: Determine if it is daily, weekly, quarterly or annually

Step 3: Determine who executes and who oversees the task

Step 4: Fill out our tool for each role/person

Step 5: Execute

Keep in mind

- Every new repeatable task should be added

- 100% completion is unlikely - this is a tool

- Make your follow-up routine simple

- Ensure goal review and tactics are represented

Next Steps

- Brainstorm on your own
- Ask every team member to create a list
- Compile one list, assigning each to 1 person
- Fill out the template for each role
- Set the expectation to follow the template
- Follow up by having people give you information

What we Covered

- What routines are any why they are important
- Template for establishing routines
- Why everyone needs them and why every task needs to be captured
- Drafted first set of routines
- Created next week's to-do list

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Template and Samples

What Questions Do You Have?

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Keep in touch

Template:

Newsletter:

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