



HAT GUIDELINES FOR AN OFFICE MANAGER OF A HEALTH CARE PRACTICE

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PURPOSES

1. To help the owner/doctor achieve the goals and purposes of the practice.
2. To organize the office and utilize the staff to accomplish the goals of the practice.
3. To develop and enforce policy that works.
4. To have a productive, smooth running, high-toned office where the owner/doctor is free to sell and produce during production hours.

PRODUCTS

The **primary** product expected of the office manager is a **productive, expanding and profitable practice** that is achieving the goals and purposes set by the doctor/owner.

To achieve this, the Office Manager:

1. Implements the management tools learned on the MGE program (such as the organizing board and statistic management).
2. Keeps the doctor/owner free to concentrate on selling and delivering high-quality, high volume care and whose productivity and efficiency are maximized.
3. Has well-trained, productive, ethical staff members producing the products of their posts with adequate volume and high quality.

As the office manager hires staff, they in turn become responsible for their own statistic and production of their assigned area. However, ultimately the manager is responsible for the overall viability and productivity of the office. Using the management tools learned on the MGE Power Program, the office manager will become more adept at training staff to competently handle their area of the practice and become productive. If the OM does *not* have an employee responsible for a certain area or statistic, the OM is by default responsible for it. For example, if there was no PR person to handle new patients, the OM would be by default, responsible for the success of the new patient statistic and would ensure that the correct actions were being done to pull this off.

It is not unusual in a smaller office for the OM to also have to wear another hat (for example, collections). The OM, pushing productivity and service (even if wearing many different hats), will end up with an expanding and productive office, requiring the OM bring in more staff. As this occurs, the OM would shed “hats” that he or she was wearing and would eventually become “single-hatted” as a manager, spending most of his or her time ensuring people were doing their jobs, that patients were flowing smoothly through the office (and were well taken care of) and that the office was very productive.

STATISTICS

Starting out, the OM operates off of two key statistics:

1. Collections
2. Production

Keep in mind though, if no one else is responsible for new patients, then the OM would be and it would be added to the list of statistics they would keep.

You could also give the OM the “profit” statistic.

IDEAL SCENE

The practice is constantly promoting and getting in new patients in adequate volume. It is run by a competent, well-trained office manager. The doctor is unstressed, in control, and achieving the goals and purposes of the practice. Collections and production are in a high range. The staff are productive, competent and of high morale. The income is above outgo. The patients are receiving high quality care, are exchanging fully for their services and are happily referring new patients.

GENERAL DUTIES OF THE OFFICE MANAGER

MANAGEMENT

1. The primary management duty of the OM is to ensure that the practice is organized and run to be productive, profitable and viable.
2. The OM sees that policy is followed and never departs from policy without the specific permission of the owner/doctor.
3. The OM sees that the work gets done. His/her job is to get others to get the work done. The OM organizes the practice for production.
4. The OM knows the business. He/she handles confusions and puts in order in the practice.
5. The OM expedites, supervises and handles all administrative actions within the practice.
6. The OM gets the owner/doctor's goals and purposes achieved. He/she does this by getting the programs targeted, assigned and done by the staff. He/she keeps the practice busy and prosperous, and its morale high.
7. The OM acts as a liaison between the owner/doctor and patients, public and peers.
8. The OM polices out all Developed Traffic in the office.
9. The OM conducts staff meetings in conjunction with the owner/doctor.
10. The OM is responsible for maintaining accurate, secure personnel files and for holding regular staff member performance evaluations on all employees.
11. The OM sees that the correct management tools are applied in the practice: organizing board, staff discipline, statistics, conditions, correct dispatches and routing, etc.
12. The OM meets regularly with the owner/doctor to plan strategies, review battle plans and coordinate activities.
13. The OM is responsible for implementing "games" for the staff which result in expansion of the business and a spirit of play in the group.

ETHICS AND PERSONNEL

1. The OM is the personnel director of the organization. He/she will train, apprentice, commend, reprimand, and correct all staff members. He/she posts and maintains the organizing board, and can hire and fire staff with owner/doctor approval. The OM is willing and able to confront, control and command with high ARC every staff member, and every staff member should be willing to take orders from the OM.
2. The OM knows and can do every job in the organization. He/she knows every hat pack and can refer staff to the correct policy in any situation.
3. The OM does not allow staff to present problems. CSWs are enforced.
4. The OM knows that getting the staff members hatted is the only guarantee that they will be able to get their products. He/she finds time for hatting to get the staff the technical skills they need to produce well.
5. The OM is responsible for ensuring that the staff keep statistics of their production, that statistics are recorded on graphs and that the appropriate conditions are applied in the practice so that staff production improves.

PRODUCTION

1. The OM is ultimately responsible for smooth and efficient patient flow and the handling of any situation which is stopping or slowing this flow.
2. The OM can stay calm in a hectic environment and handle any production situation competently.
3. The OM knows enough about organization to organize for the most efficient production. He/she never plays favorites and deals with all fairly and professionally. The OM is willing to re-post or remove unproductive and/or unwilling individuals for the good of the organization.
4. The OM maintains the communication lines between posts allowing patients to move smoothly through the practice.

FINANCES

1. The OM assists as needed on all financial matters in the office. Minimally, the OM would ensure that the finance area of the practice is being handled properly and ethically and takes measures to ensure there is no embezzlement, day sheets are balanced and patient accounts are straight. The OM might at the doctor's discretion be responsible for accounts payable and take care of office bills.
2. The OM makes sure that income is always greater than outgo.
3. The OM sees that the financial policies as laid down by the owner are the only policies followed.

ATTRIBUTES OF AN IDEAL OFFICE MANAGER

1. The manager is a top-caliber executive who knows and applies executive tools and technology, gives correct orders and gets orders executed.
2. The manager is high-toned, has high personal ethics and integrity, is fully professional, cares about the practice and doctor, and is dedicated to accomplishing the goals of the practice.
3. The manager has excellent confront and excellent communication skills.
4. The manager has high affinity, reality and communication for the doctor, the staff and the patients as well as for the job.
5. The manager will confront and handle immediately any non-productive personnel and all non-optimum situations.
6. The manager does not Q and A but gets compliance to orders, projects and actions.
7. The manager knows the business. The manager is unreasonable.
8. The manager plays no favorites. His/her judgment of staff members is only as to their worth to the group.
9. The manager has a business-oriented, not worker-oriented viewpoint in all decisions.
10. The manager leads creatively, persuasively and by example. He/she does not resort to threat or intimidation, but uses ARC and faith in the basic good intentions of the staff to get compliance.