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6 Ways to Get Your Medical Practice Organized

Tired of decreased productivity? Here's how to get organized and whip your practice back into shape.

By Shelly K. Schwartz | April 2, 2012

You spent the last two hours trolling your file cabinet for a missing receipt. The staff keeps popping in with trivial questions. And it just dawned on you this morning that the monthly board meeting is on Friday, forcing you to cancel two appointments to prepare. Tired of spinning your wheels yet?

Office managers juggle a mind-boggling number of tasks, from personnel problems and physician credentialing to budget planning and payroll. Without a strategy to stay organized, it's easy to get lost in the minutia, creating higher stress levels for you and decreased productivity for the entire office.

"A practice administrator not only has to wear a bunch of different hats, but he or she has to keep all things related to those hats in good order so you can put your hands on what you need quickly whenever you need it," says Mary Pat Whaley, a practice administrator for 25 years and founder of the consulting firm Manage My Practice in Cary, N.C.

Prioritize

The first step to creating order from chaos, says Keith Borglum, a practice management consultant with Professional Management and Marketing, in San Francisco, is to set priorities.

"A basic rule of management is that there is never enough time to do everything," he says. "You can't do it all. You have to triage your workload, figure out what's most important, and do that." A daily to-do list, whether electronic or handwritten, can help. "It's easy to look at your list and do the most attractive thing first, but you'll be able to see at a glance what's more critical," says Borglum, noting a written list also helps to identify priorities for the following day, which helps you hit the ground running when you walk in the door.

Keep in mind that some of your lower-priority tasks may never get done, and some, like expansion plans or personal goals, will remain on the back burner for years. That's OK, says Borglum. "I have things on my list that have been there for three to five years," he says. "Long-range planning often evolves from daily to-do lists."

Calendar control

A carefully groomed calendar is also critical. Each month brings with it a new set of deadlines — financial reports, profit sharing and 401(k) filings, training requirements, internal project milestones. Everything you can reasonably anticipate should be documented on your calendar. "We sit down at the beginning of the year and plan out each month, designating a specific month for OSHA and HIPAA training and another for the government programs we participate in, like e-prescribing and meaningful use," says Susan Miller, administrator of Family Practice Associates of Lexington, in Lexington, Ky. "We always know what deadlines we're working toward."

Her calendar also includes staff and board meetings, group gatherings for staff recognition, grand rounds for the physicians, and a series of reminders ahead of important deadlines to verify progress along the way.

Revisit open-door policies

Though Miller is on top of her schedule, even the most organized manager can't get down to business if she's constantly being distracted, says Capko & Co.'s Judy Capko, a practice management consultant and author of "Take Back Time" for office managers. "Managers often brag about having an open-door policy with their staff, but that's not something you should be bragging about," she says. "You have to be accessible to your staff, certainly, but you should set one-hour slots each day where you're available to be seen and are able to accept interruptions."

Even then, it should never be a free for all. "Put criteria on it," says Capko. "Tell them if it's something they can handle themselves, they should do that." Make sure your team has the training and tools they need to solve their own problems. "A lot of times your employees come to you because it's easier or faster, but that job should really fall to a lower level person so you can spend your time doing things that require your level of expertise," says Capko.

Open mail once

It pays, too, to establish a policy of not opening mail, electronic or otherwise, until you're prepared to deal with it.

That prevents the time suck of having to sort through bills and e-mails more than once. A three-part file system of "do now," "do later," and "file" can help you process the most pressing paperwork quickly as your work flow allows. Everything else should be trashed, which has the added benefit of helping to reduce clutter.

Borglum also suggests asking your team for ideas on ways to organize their own departments. Allowing them to implement their suggestions fosters a sense of ownership.

Order online

You should also have a system in place to keep close tabs on office supplies, which prevents the mid-morning rush to the store for ink cartridges and helps control inventory. The Internet makes it easy, says Borglum.

"It's inefficient to be driving over to Office Depot or Staples every few weeks, when most suppliers these days offer online ordering," he says. "That takes you [or a staff member] out of your seat, and interrupts efficiency." Such vendors generally keep track of prior orders so you need not reinvent the

wheel each time you go to order printer paper or new pens. You'll also be better positioned to keep track of brand, model, and item numbers for all your office supplies and generate utilization reports. "That helps control embezzlement, and pilferage which is much more common," says Borglum. "That happens when someone orders a case of tape for the office and brings half of it home with them."

Make an emergency plan

Finally, the organized administrator should always be prepared. The Medical Group Management Association recommends all practices have a secure back-up system in place to store duplicate personnel and financial records, in the event of a power outage or IT meltdown. You should also have a plan for fire emergencies, hazardous spills, and breaches of security that includes a grab-and-go bag that has important phone numbers for the building manager, fire department, employees' home and cell phones, and insurance contacts.

By putting your ducks in a row and setting priorities every day, you'll be able to use your most limited resource — time — more effectively. An added perk: When you're not playing catch up as a matter of course, you're likely to sleep better, too.

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