

Advanced Practice

MANAGEMENT

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HUDDLE CHECKLIST

Each week, one team member facilitates meeting all week. (This is rotated from team member to team member each week).

1. Yesterday's Schedule (what went right/what were the challenges)

- Doctor/Assistants Schedule
- Hygienists Schedule

2. Today's Schedule:

- Administrative:
 - ID patient needs thru pertinent personal information – finances, special circumstances, phone discussions, etc.
 - New Patients, Emergency patients – any Hot Buttons (personality quirks known)
 - Next available production block (one hour or more)?
- Assistants:
 - Where do we want to see emergency patients today?
 - Health concerns – ID BP readings needed, etc.
 - Does treatment plan for appointment confirm with schedule?
 - Identify any problem patients or procedures (sample: fearful, hard to numb, PIA-☺)
 - Photos needed (before and after-full face photos, photos for ins-pre and post prep, etc.)
 - Next Continuing Care appointment – scheduled, overdue?
- Hygiene
- Undone dentistry – need to schedule
- Other family members due

3. Marketing Information (All)

- Referrals asked for from previous day (i.e., phone conversations, compliments from patients, consults and new patient visits). Any “missed opportunities”
- Identify NP referral sources – referred by: GP/Yellow pages or advertising/patient/insurance
- Who should we identify on schedule to ask for referrals from today?

4. Next 2 Days Schedules:

- Are lab cases here?
- Repeat offenders?
- Bottlenecks in Schedule?