

# A Manage My Practice Classic: Ten Golden Rules for Your Medical Office Staff



*Mary Pat's Note: This first ran in 2009 and it continues to be a visitor-favorite! If you are using it and added your own rules to it – leave us a note in the comments and share your own “Golden Rules.”*

Sometimes employees do not understand or follow the most basic of workplace guidelines. Here is a simple but comprehensive list that you can tweak to make your own. It covers about 25 basics in a short list of ten “Golden Rules”. Make it part of each job description or personnel handbook and/or post it in strategic places.

1. **Report to work on time daily.** Be ready at your desk to begin work at the designated time. Leave promptly for lunch and return to work when you should, unless you've made special arrangements with your supervisor. Take breaks on the honor system and do not abuse the privilege. Clock in and out faithfully.
2. Command respect from the physicians, managers and employees of (*your practice name here*) by **demonstrating total professionalism** in the

workplace with your dress, your demeanor and conversation. Represent the practice in a way that would make your Mother and your boss proud of you. Treat your co-workers as you would like to be treated.

3. **Be economical** by not wasting time or supplies or doing sloppy work that must be re-done.
4. **Give every patient your total attention, patience and courtesy.** Do not assume you know what the patient is going to say, but listen carefully to the patient (in-person or on the phone) so you can assist them to the best of your ability. Remember how good it feels to be the center of someone's attention and give that gift to every single patient.
5. **Keep your supervisor aware of any problems** in your workload, whether too much or too little. Do not expect your supervisor to know if you are falling behind or caught up.
6. **Document all interactions** with patients and other medical facilities to assist your co-workers in knowing what you have done, and document your resolution of the situation to the customer's satisfaction.
7. **Strive for a positive attitude every single day.** Don't whine.
8. **Be a team player.** This means both covering for your co-workers and knowing that they will cover you. This means supporting your co-workers to their faces and behind their backs. This means having (*your practice name here*) goals for your goals, and knowing that your success will be your team's success, and ultimately, the success of the practice.
9. **Clean up your own messes** and act as an adult acts in the workplace: responsibly, maturely, and with thought for others. Accept blame for your own

mistakes, knowing that everyone makes them, and that if no one is making any mistakes, nothing is improving.

10. **Contribute to making (*your practice name here*) a good place to work.** Only you can create a place where everyone enjoys working. Only you can make this place a good place to be.

For more medical office rules, read [“21 Common Sense Rules for Medical Offices.”](#)

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# 21 Common Sense Rules for Medical Offices



Image by George Eastman House via Flickr

There seem to be a lot of people searching for rules for medical offices. I've never heard of such rules, but since people are looking for them, I thought I'd write some.

1. Medical offices are professional workplaces and staff need to dress, speak, and purport themselves professionally.
2. Patients are customers and customer service should be paramount. Give all patients the utmost respect and practice compassion, compassion, compassion.

3. If it didn't get documented (on paper or electronically), it wasn't done. If it didn't get documented, you can't charge for it.
4. HIPAA. First of all, please spell it correctly. One P, two As. Secondly, know what it means and make it so!
5. Never enter an exam room without knocking.
6. Confirm patient identity (name, date of birth, etc.) before giving injections, taking specimens or performing a procedure.



Image via Wikipedia

7. Remove very sick or very angry patients from the front desk immediately. Take the sick ones to exam rooms and take the angry ones to the manager's office.
8. Do not use medical jargon with patients. If they don't know what you're talking about, they might be too intimidated to ask.
9. Wash your hands. Often. No matter what you do in the practice.
10. The office should be CLEAN, fresh and up-to-date. No dying plants, no magazines more than 9 months old, no dust bunnies behind the doors, no stained seating or carpets.
11. Train staff to apologize, and to apologize sincerely.
12. Complaints from patients and staff need to be addressed in 2 weeks or less.
13. Medical equipment is to be maintained and tested annually for safety and performance.
14. Once a medical record is finalized, the only changes to a paper record are single line strike-throughs with corrected information and initials, or addendums. There are no changes to electronic records, only addendums.
15. Patients don't understand insurance. Be the expert.

16. Shred confidential practice paperwork and patient-identified information on-site.
17. Keep medications (including sample medications) in locked cabinets and use a good inventory system to log the use and replacement of stock.
18. Strive to meet patients at their communication level. Use graphics, translated materials and interpretive services when needed.
19. Don't expect patients to be on time for their appointments when the provider isn't.
20. Don't make copies from copies.
21. Give everyone the benefit of the doubt. There's always more to the story. Okay, this is really a rule for life in general, but it works in medical offices too.

Leave a comment and tell me what rule you would add.

For more medical office rules, read ["Ten Golden Rules for Your Medical Office Staff."](#)



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