

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.”**



My Take on “10 Ways to Keep Employees Happy” in Medical Practices

✘ I don't often find articles that reflect my own views as closely as the article **“10 Ways to Keep Employees Happy” from HowStuffWorks by Cristen Conger** does. Not only does Ms. Conger hit the list with 10 strong concepts, but she also gives great sources to back up her points. Here are her 10 points – click each one to go to the page for more information.

10. Offer Flexible Work Options Some jobs in medical practices are ideal for flexible work options, but most are not. Any position that requires face-time with the patient will likely need to adhere to appointment hours. My question: is it “fair” to allow some positions to have flex-time and others not? If you have a group of people all doing the same general job, letting some people have flex-time and others not may lead to a mutiny. Consider carefully the precedent you are setting when allowing flex-time, and make sure employees understand that as the needs of the organization change, work arrangements may need to change.

9. Practice Open Communication I couldn't agree with this one more. Communicate, communicate, communicate. One-on-one, in departments, in all-staff meetings, in all-organization meetings. I typically send out an electronic newsletter every

Friday (an idea from my mentor, Tom Girton) that announces/reminds people of events, clarifies policies and acknowledges achievements. Oh, and don't forget to make sure that people are understanding what you're trying to communicate. Touch base every once in awhile to make sure the message you're sending is the one they're receiving.

8. Pencil In Face Time When beginning a new job I often meet with every employee who reports to me (and sometimes meet with everyone in the organization in a smaller practice) for at least an hour to learn a bit about them and hear what they think the practice is doing well, and what the practice could be doing better. Yes, it takes a lot of time, but it starts to form a bond with individuals and it gives me more information that anything else I could do to start to learn about my new group. People are fascinating and I really enjoy an uninterrupted hour with someone – it's almost a luxury in this day and age. Once you've established that bond, make sure to nourish it by connecting with individuals on a regular basis. Letting people know you truly care about them as individuals is how dynamite teams are created. And the karma ain't bad either.

7. Recognize Success and don't save it all up! Recognizing efforts, going the extra mile, dealing with a difficult patient, all deserve a pat on the back in front of other employees. Remember to always praise in public and counsel in private. Share the joy of something well done, and let the employee have the privacy of a critique.

6. Set Goals I like to establish individual goals every six months during the annual performance review and six months later during a less-formal touch base. 12 months is a long time to keep a goal in mind, so I prefer to deal with 6-month goals. Performance evaluations should not be a rehash of what was done right and wrong over the year, but rather should be a time to review the goals from the last six months and see what wasn't accomplished and why, as well as celebrating the goals

that were accomplished. **See my simple evaluation for more information.**

5. Explain the Big Picture I'm often surprised how many medical practice employees don't understand how their job (especially done well) contributes to the big picture. Check-in staff might not understand how their job impacts billing. Scheduling might not understand how their job impacts the nurses. Nurses might not understand how their job impacts the check-out. No one may understand what their efforts mean to the financial viability of the practice. If all the staff know that they haven't had raises for two years yet new medical equipment is being purchased for a new service line, they need to have some insight into why a decision was made and what potential it may have for keeping the practice viable.

4. Provide Career Growth Opportunities This fits in well with the 6-month performance evaluation when you set goals with your employees. Goals may include projects, new skills, improved skills, shadowing other jobs, cross-training on other jobs, conferences and workshops, and online or classroom training. Never think that someone can't do something as predicting success is one of the hardest things in the world. Encourage everyone!

3. Give Employees Respect Give everyone respect. Know that every single person is much deeper than you will ever know and more fragile than you would ever expect. Never forget that you can make someone's day and break someone's day. Being a manager is making a choice to care for and respect the people who have chosen to work with you. In many ways, management is the most powerless job (next to parenting) there is.

2. Provide Consistent Feedback For you to effectively provide feedback, positive or negative, the employee must have been trained, must have resources to help them do their job and must understand the expectations of the job. Do not take for

granted that your front desk person knows instinctively that your expectation is to have the day's charges posted and reconciled before the end of the day. Have written performance expectations for each person, then explore the reasons why those expectations are not being met (communication, misunderstanding, workload, etc.)

1. Build Trust I'm so glad Ms. Conger put this as #1 -I agree! Here's how I build trust: Keep confidences. Follow the same rules I set for the staff (if they can't eat at their desks, neither can I.) Make promises sparingly and fulfill all promises. Don't mess up peoples' payroll or their time off. Understand the details of their job. Don't allow the doctors or the patients to abuse them.

What's not on this list that you would add?