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On the topic:
Time Management 101
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TIME MANAGEMENT 101

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DO YOU RUN YOUR PRACTICE OR DOES IT RUN YOU?
• Do you consistently run more than 15 minutes behind in your schedule?
• When was the last time you and/or your staff left work within 15 minutes of checking out the last patient?
• When your day is over, is it REALLY over, or do you find that you have too much unfinished business left over for the next day?
• DOCTOR, is it taking you more than 24 hours to complete chart notes?
• Do you feel like you are spending more time on administration than doctoring?
• Are your staff members telling you they need more help, but your numbers don't support that?
• When was the last time you took a vacation (more than a long weekend)?
• Do you feel torn between your practice and your family?

If you answered YES to any of these questions, you are in the right place, and help is on the way!
WHERE DO YOU LIVE?

• **URGENT/Not Critical** – You have a coffee date with your friend at 7:00 am. It’s 6:50 and you are 30 min out.

• **URGENT/Critical** – You are leaving for a cruise in a week and forgot to renew your passport.

• **NOT URGENT/Not Critical** – You decide after 2 years of procrastination that TODAY you HAVE to clean out the linen closet

• **NOT URGENT/Important** – You are leaving for a cruise in three months and need to renew your passport

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Translate to your Practice….

• **URGENT/Not Critical** – You realize that you just used the last of the sterile gloves in the clinic and delivery isn’t for another week. And you have a full day of patients. You have to send someone to the medical supply store in town to get a few boxes to tide you over.

• **URGENT/Critical** – It’s November 1 and you realize you forgot to order flu shots. You call your vendor and they are out of stock for the year. Now you have to search for other vendors that might carry the product.

• **NOT URGENT/Not Critical** – Doctor is on vacation but staff is working. Instead of tackling unpaid claims, patient collection calls, etc., you get everyone to spring clean the clinic, even though you have a cleaning service.

• **NOT URGENT/Important** – You just got notice from Blue Cross that your credentialing needs to be updated and it’s due in 45 days.
THE PROCRASTINATORS

- The least stressful way to conduct any day in your life is to be focusing primarily on activities and/or encounters that are NOT URGENT but IMPORTANT. You don’t want something IMPORTANT to become CRITICAL.

- Procrastinators routinely turn events and activities that are NOT URGENT into URGENT and tend to exist in the URGENT/Critical realm. Very stressful way to live and very stressful on the people around them.

The Victims....

- Some people and/or entities that have poor time management skills also lack focus and direction in practice and life. They constantly fly by the seat of their pants. So they let the day/week/month/event direct their daily activities vs. choosing activities that will help them achieve their objectives. They feel they have no choices and are just victims of circumstance.
The Drama Junkies

• There are people who seem to thrive on drama; some to the point that they create drama where none exists or should exist.

• This takes up a lot of unnecessary time for both the “junkie” and the people around them, as they perpetually deal with the fallout from these individuals and the events that follow.

Turning it around....

• If you have issues with time management, there are some short term and long term solutions to help turn things around.
  – The Morning/Afternoon Huddle
  – The Short List
  – The Delegation Game
  – The Stupid List
  – The Staff Meeting
  – The Vision Board
  – The Goal Setting Session
  – The Strategic Planning Retreat
The Morning Huddle

• Get together with your team EVERY morning before seeing patients (and afternoon, if you have split shifts)
  – No more than 5 minutes
  – EVERYONE participates, even clinicians if possible.
  – For large clinics/groups, this can be done by department

What to discuss...

• Interactive overview and game plan for the day
  – OFFICE MANAGER: Today we have 50 patients, 30 in AM and 20 in PM – if doc gets called to hospital this morning, let’s move the patients affected to THIS PM slot (i.e., 2-3 pm)
  – BILLING OFFICE: I see that Regina Smith is on the schedule. She has an outstanding balance of $200. Be sure to collect her copay PLUS the balance due
  – DOCTOR: I have a meeting at 12 noon today. Don’t schedule any patients after 11:30 am
  – FRONT DESK: I noticed that the drum light came on the copier yesterday afternoon. Need to call for service so we don’t get stuck without the copier today.
  – OFFICE MANAGER: Tiffany (Front Desk - 2) Called in sick today. So I’ll need James (Billing office) to answer phones and schedule patients. We will switch phones to ring in the back. Suzanna (Front Desk 1) will handle check in, check out and triage.
  – END HUDDLE with something Positive, Inspirational or Light Hearted. Ask each team member to contribute. Builds team spirit. Ideas: Bad joke of the day. Inspirational Quote. Funny “safe word.” Something positive about a staff member, etc. Prayer-only if EVERYONE on team is comfortable with this.
Time Management Tool

• The Morning Huddle as a time management tool helps you anticipate potential time issues and bottlenecks, and allows you to deal with them.

• The Morning Huddle also helps by keeping your team cohesive and in sync with each other. Everyone can better understand the challenges of each department and the value their work brings to the overall success of the clinic.

The Short List

• One of the quickest solutions to time management issues is to create a list of “six things to do today”. General Rules:
  – Each item on the list should be in the NOT URGENT/IMPORTANT category (might take you a little while to get there, if you are a procrastinator)
  – If you don’t get to every item on the list, the unfinished item goes on your next day’s list.
  – NEVER less than THREE and NEVER More than SIX things.
  – Can Be a Mixture of Business and Personal, but never ONLY personal
  – Best to make the list at the END of the day for the next day. Review in the morning for last minute modifications
  – Put your LEAST favorite item at the top of the list; get it over with.
  – Bring your Short List to Morning Huddle and Share necessary items with staff
EXAMPLE - Doctor

1. Finish Dictating Narrative on J. Sanchez
2. Meeting with Hospital Credentialing department at noon
3. Stop by Post Office and get Passport Picture done
4. Set up meeting time with Jennifer (OM) to discuss hiring scribes
5. Call attorney to schedule appointment for estate review
6. Remind FD to block me out on Sept 12th A.M. for kids field trip

NOT A GOOD LIST

1. Pick up dry cleaning on the way home
2. File charts from yesterday
3. Take out trash
4. Go get birthday present for Susie’s friend’s birthday party
5. Get groceries
6. Pay electric bill by 5, due today
Too Much on Your Plate…

• Many times, time management issues occur because you have TOO MANY things to do and/or keep track of.

• Office Managers/Clinic Owners will often rely more heavily on the sharper, more focused employee, and load them down with too much work because they handle it so well. But that can create a critical meltdown in that staff member and burn them out.

The Delegation Game

• Start at the top, (Doctor and Office Manager).

• Look at all your daily/weekly/monthly duties. Make a list of them. Break them down by frequency.

• Ask yourself “Is this something I personally HAVE to do, or can I delegate this?”

• If you can, delegate it to someone else.

• If THAT person ends up with too much on THEIR plate, they would make a list of all their duties and do the same exercise. Office staff would need to coordinate organization of tasks and/or delegation of duties with Office Manager.

• This CAN be turned in to a visual game that can be played at a staff meeting or Strategic Planning Retreat. It’s called Box of Rocks. Quickly helps to identify the staff members that have too much or too little on their plates. More on this later.
The Stupid List

- This is a wonderful way to quickly identify practice inefficiencies that could be causing time management issues and practice bottlenecks.
- EVERY member of the office participates
- Each member is asked to make a “What’s stupid around here” list. Ask for 5-10 things that are being done inefficiently, that waste or take too much time.
- Can be anonymous, but you can usually figure out which department it comes from
- Do this about once a year
- OM/Clinic Director gathers lists and reviews. Look for duplications. If you have 10 employees and all of them mention the SAME thing, these would be items to address right away. Other departmental items can be addressed with individuals or per department.
- Very good tool to use during a staff meeting or Strategic Planning Retreat.

A Smart Stupid List

1. I have to copy insurance cards at the front desk, but the only copier in the clinic is in the business office at the back of the building.
2. I’m told to schedule the first patient at 8, but the doctor doesn’t get back from rounds until almost 8:15 every day, and sometimes later. So we are always running behind in the schedule.
3. We have two people at the front desk every day. We have two computers, but only one phone.
4. I’m told to collect copays at time of service, but many times the patient’s insurance hasn’t been verified by the time they check out and their info is not updated in the computer. And I get in trouble.
5. I’m supposed to call patients and confirm next day’s appointments, but I’m the only one at the front desk and it’s always too busy up there.
6. We schedule a 30 minute staff meeting every Wednesday at noon, but we schedule patients up until noon. So we never finish with patients by noon, so our staff meetings are either cut in half or we don’t have them at all.
The Staff Meeting

• Each week things will crop up in the practice that need to be addressed in a timely and efficient manner.
• The problems/inefficiencies become compounded, because there is no formal time to meet and discuss these issues. So the problems are addressed as they happen (which wastes time), or not at all (which wastes time).
• Holding a weekly staff meeting to address problems and clear the air helps keep everyone on task and focused, and reduces time wasting.
• “If it’s not burning down, we can talk about it in staff meeting.”

Agenda

• Someone should record the meeting either in writing or audio (just like a corporation records the minutes of a board meeting).
• Office Manager should require EACH department to report. This should not be a one pony show.
  – Minutes from last meeting
  – Discussion of tasks and completion deadlines from last meeting
  – Discussion of new issues/problems
  – Assignment of tasks to resolve new issues and setting of deadlines
  – Overview of activities/schedule for the following week
Long Term Projects

- Long Term Projects that could significantly improve Time Management:
  - Creating a vision board for the practice
    - Helps to define where you want to take the business over the next 1-5 years
  - Setting Goals to achieve the objectives on the Vision Board.
    - Set both short term and long term goals
  - Hold a Strategic Planning Retreat to deliver the vision and work out any bugs that could prevent the dream from becoming a reality

Breaking the Time Barrier

- Strategic Planning Retreat (SPR)
  - One full day (believe me, you will have enough to talk about!)
  - Off Campus (retreat center, banquet hall, etc.)
  - Casual Attire, lots of junk food
  - Can be with everyone or just Management team
  - No outside interruptions/cell phones, etc. Need to be totally unplugged for the day
  - End of year is usually a good time to schedule one, so plan NOW. Don’t fool yourselves in to thinking you don’t have enough TIME to do this.
The SPR – General Guidelines

- Identify time management topics you want to tackle
- Prepare Agenda
- Decide if you will do all staff for the full day, or conduct micro sessions (afternoon sessions for doctors and separate session for staff)
- Some bigger clinics might need multiple SPRs; one for doctors, one for staff
- Appoint a Facilitator – might be the clinic owner, office manager or outside consultant. If problems with office morale and time management are severe, an outside, impartial consultant can be beneficial.
- Include team building activity – game/scavenger hunt, go for walk, etc.

General Guidelines

- SPR’s are RANKLESS – Sometimes the best ideas come from people who are in the trenches. Everyone is on even ground.
- Participants may NOT use SPR as a gripe session. If there is a problem to be discussed, it must be accompanied by a solution.
- Problem solving session will be used to create a plan for solving a time management problem and delegating a team member to oversee that plan with the rest of the staff.
Sample Agenda

8:00-8:30 Coffee/Breakfast
8:30-9:00 Goals and Vision
9:00-10:00 Overview of Challenges
10- 10:15 Break
10:15-12 What’s Stupid Around Here?
12 – 1:30 Lunch and Team Building Activity
1:30 - ?? Problem Solving
     Box of Rocks

Box of Rocks- How it Works

- Write down tasks-the more detailed you can be, the better. Don’t just write down what you do, but HOW LONG it takes
- Get some large rocks (bags of potatoes work well too)
- Write your task down on a strip of paper, tape it to the rock or potato
- Everyone sits in a circle and sets their rocks at their feet.
- This will visually show all the team members which employees have too much on their plate.
- Employees with more time on their hands can voluntarily or involuntarily (by office manager or doctor), take on a task of an overloaded employee.
- If EVERYONE is overloaded and some of the tasks can not be reassigned, put the rock in the middle of the circle. This will help illustrate whether it’s necessary or time to hire additional staff.
Questions?

• Thank you for your attendance!

• Get your questions answered on PMI’s Discussion Forum: http://www.pmiMD.com/pmiForums/rules.asp

• Contact information: lmaciejewski@pmiMD.com

PMI Consultants are highly qualified and experienced. If you would like information on how to obtain more specialized training for your clinic, or on having a consultant facilitate a strategic planning meeting or in-house visit, please contact Michael Moore at 800.259.5562 x270 or by email at mmoore@pmiMD.com.