FREE DOWNLOAD

CLINICAL CRITICALS CHECKLIST

GET YOUR CLINIC OFF LIFE SUPPORT BY ENSURING ALL YOUR CRITICAL CLINIC BUSINESS OPERATIONS ARE IN HAND! WITH NO MORE FIRES FIGHT YOU ARE FREE TO FOCUS ON THE THINGS THAT ARE MOST IMPORTANT TO GROWING A HEALTHY PRACTICE

WELCOME

UNDERSTANDING THE CLINIC CRITICALS CHECKLIST

Don't get caught out by lack of organisation

- Owning a clinic requires hands-on your business
- You have roles and responsibilities
  - Database protection
  - Having adequate insurance
  - Safe card/payment handling
  - Making sure client issues are resolved quickly
  - Professional body compliance
  - Keeping up-to-date professionally

Golden rule: make sure you develop a system so you know when all the critical activity critical to your clinic needs doing.

You can do this by creating a Clinic Critical's Checklist with supporting processes for all cyclical tasks AND either delegate to a business administrator or plan to!! This way you are free to focus on the big stuff and know you can't miss a critical deadline that could cause a problem.

HOW TO USE THIS CHECKLIST

You have a printable paper copy of the Clinic Criticals Checklist and a spreadsheet version, choose which version suits your practice best.

Then amend the Criticals Checklist for your practice needs by doing the following

- Identify dates and highlight dates activities need to occur
- Identify who is responsible for the completion of the
- calendar
- Activities are initialed and dated on completion
- Implement
- Amend supporting processes to meet your needs (I recommend giving ownership to the person responsible for completing the process and the responsibility for updating the process as they will know it best)
- Determine when the manager should audit the checklist
- Review and update as required

Your calender may include all or some of the following:

Daily
- Check Daily for Messages - social media, email & voicemail
- Daily Payment Check
- Daily Appointments check
- Daily HouseKeeping
- Daily Forward Order Book
- Health and Safety Site Checklist

Weekly
- Forward Order Book
- Annual leave Approval
- Debt Collection process
- Communication Checks
- Laundry
- Weekly accounts

Monthly
- Clinician Diary Set Up
- Ordering
- Submitting Payroll report
- Quarterly Forward Order book completion and review
- Monthly accounts

Quarterly
- Clinical Notes audit
- Quarterly Objective setting
- HR Review check personnel details are correct

Annual
- Year-end accounts
- Professional Indemnity Insurance Renewal
- Employers Liability Insurance Renewal
- Data Protection Renewal
- Professional Standards Audit
- End of the annual leave year
- Rent review
- Check email addresses and url licenses
- Annual review's
- Electrical Safety Testing

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DAILY CHECK LIST

MONTH:	RESPONSIBLE:	DATE AND INTIAL WHEN COMPLETED:

THE TASKS

Check and respond to messages

Payment check

Appointments check

Housekeeping

Forward Order Book

Health and Safety Site Checklist

İNITIAL DATE WHEN ALL COMPLETED:

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

WEEKLY CHECK LIST

MONTH:	RESPONSIBLE:	DATE AND INTIAL WHEN COMPLETED:

THE TASKS

Forward Order Book

Annual leave Approval

Debt Collection process

Communication Checks

Laundry

Weekly bookeeping

INITIAL WEEK WHEN ALL COMPLETED:

:

1 2 3 4 5

MONTHLY CHECK LIST

MONTH:	RESPONSIBLE:	DATE AND INTIAL WHEN COMPLETED:

THE TASKS

Clinician Diary Set Up

Ordering

Submitting Payroll report
(As per your contracts and policy)

Quarterly Forward Order book completion and review

Monthly accounts, inc payments out

INITIAL MONTH WHAN ALL COMPLETED:
:

1	2	3	4	5	6
7	8	9	10	11	12

QUARTERLY CHECK LIST

MONTH:	RESPONSIBLE:	DATE AND INTIAL WHEN COMPLETED:

THE TASKS

Clinical Notes audit

Quarterly Objective setting

HR Review check personnel details are correct
(Confirm all employee's personnel details and ensure stored securely)

:

INITIAL QUARTER WHN ALL COMPLETED:

Q1

Q2

Q3

Q4

ANNUAL CHECK LIST

MONTH:	RESPONSIBLE:	DATE AND INTIAL WHEN COMPLETED:

THE TASKS

Year-end accounts

- Pay corporations tax 31/1
- Electronic filing of accounts and self-assessment 31/1
- Pay half of the current years tax 31/1
- Self-assessments 5/4
- Prep personal tax return 5/4
- Annual return to companies house 15/5
- PIID's

Professional Indemnity Insurance Renewal

Employers Liability Insurance Renewal

Data Protection Renewal

PCI DSS Compliance

Electrical Safety Testing

Rent review

Check email addresses and url licenses

Professional Standards Audit

End of the annual leave year

Annual review's

:

THE MARKLAND METHOD

DAILY CHECKLIST

CHECK AND RETURN MESSAGES

RESPONSIBLE: FRONT DESK

1

STEP ONE

Check
Social Media
Voicemail
Email

2

STEP TWO

Return calls – If no response leave voicemail and email

3

STEP THREE

Contact any cancellation to arrange a reschedule

DAILY PAYMENT CHECK

RESPONSIBLE: FRONT DESK

1

STEP ONE

Every morning go to diary for day the day and check any for any uncreated invoices and unpaid invoice's from previous working day

2

STEP TWO

Before contacting the client for payment reception are to check the clients:

- Appointment has been correct eg: person/body responsible for payment is correct
- Invoice has been created

3

STEP THREE

- Check the comments in patient details, if permission has been granted for remote payment
- If it has process payment

4

STEP FOUR

If permission not given to take payment call client

5

STEP FIVE

If no response create and email the invoice and make a note of call in client log

TROUBLESHOOTING

A Payment may havebeen made but the invoice has not been created

DAILY PAYENT CHECK

RESPONSIBLE: FRONT DESK

1

STEP ONE

Check all patients booked for today and confirm whether appt is

- self-fund or insurance
- if any outstanding payments are due

2

STEP TWO

If coming to the end of a treatment plan inform clinician

DAILY HOUSE KEEPING – FIRST IMPRESSIONS MATTER

RESPONSIBLE: FRONT DESK

We are judged on attention to detail to everyday/household things including

- Clinic appearance
- Waiting area and treatment rooms
  - tidy
- Personal
  - Hair, make-up, clothes ironed, posture, attitude
- The room
  - clean floor, bed, pillows, couch roll, shelves
- The greeting
  - eye contact, smile, shake hands, greet, welcome Introduction of self
- Sharing personal moments with them
- Taking off coats/bags
- Warmth exuded

DAILY HOUSE KEEPING - RECEPTION AREA

RESPONSIBLE: FRONT DESK

Reception are charged with a variety of administrative support functions, such as answering the phone, greeting visitors, scheduling appointments and making sure the reception area is tidy and welcoming. Reception are essential, because the work they do affects the success of the company and portrays the kind of service the business offers.Failure to provide this can result in existing or future clients not returning and going elsewhere.

- In between patients it is important to still maintain a professional attitude. Good working relationships are important but chat should be kept to a few minutes as other members of the team have a job to do and do not require distractions, eg.‘desk hanging’. This also gives a poor impression to the client’s which can be detrimental to the business.
- Stay away from eating food or drinking around reception, handbags and mobile phones should be put away in the designated cupboard, and cups/water bottles to be kept to a minimum on display.
- Part of having good etiquette entails maintaining an environment that is welcoming, clean and comfortable for others.
- We must maintain a professional reception area that is free from food and drink debris.
- Reception should not be an area used for staff to sit or chat and gossip.
- The team should keep things neat and clean, provide magazines for visitors to read while they wait, offer guests water and greet people appropriately.

DAILY HOUSE KEEPING - CONFIDENTIALITY AT THE RECEPTION DESK

RESPONSIBLE: FRONT DESK

Never leave the Reception desk unattended with the computer screen on show.

- Ensure that no client letters/reports are left for all to see
- Shred any client details once they have been dealt with, DO NOT throw them in the waste bin.
- If discussing a client's condition, move away from people around you
- Any receipts are to be shredded if not required, they are not to be left lying around on the desk
- Any patient documentation to be stored out of view

DAILY HOUSE KEEPING - TREATMENT ROOMS

RESPONSIBLE: FRONT DESK

The following are rules that apply to all treatment rooms and must be adhered to on a daily basis.

- Rooms must be clean and tidy at all times and must be left clean and tidy for the next days appointments.
- If the floor is soiled use a dustpan and brush to remove debris
- Work surfaces must be kept clean and tidy
- Treatment couches must be clean and a fresh couch roll in place ready for the next client.(Couch rolls are not to be stored or kept on the floor as this is against infection control).
- Clients are to be asked to remove shoes before lying on the plinth
- Bins should be emptied regularly and should never be overflowing
- Any spillages to be dealt with immediately
- Food can be eaten in the treatment room/s with the doors closed or if it has a strong odour it must be eaten in the café or staff room only. All food waste must go in the reception waste bin.
- Remove any used cups/crockery once finished with.
- Handbags/Rucksacks, Coats, and mobile phones are to be put away in lockers

DAILY HOUSE KEEPING - CLEANING AND LAUNDRY

RESPONSIBLE: FRONT DESK

- Rooms are cleaned weekly
- Pillowcases are changed x2/week by Client Support team
- Dirty laundry (Towels and pillowcases) are to be placed in the laundry bins
- The designated receptionist will collect and arrange the laundry and is responsible for ensuring that their Clinic location has a ready supply of clean fresh linen and towels.
- Only use products TMC have COSSH for or that have been authorised for use

DAILY HEALTH AND SAFETY CHECK

RESPONSIBLE: FRONT DESK

Opening

- Record you are on site
- Make a visual cable and pug check on all portable electrical appliances remove anything damaged or faulty
- Check all areas for hazards eg: trailing cables, chemicals
- Check any firefighting equipment is in correct location, ensure fire exits are unobstructed and routes are clear
- NOTE: any internal doors should not be propped open
- Report any issues to the manager

Closing/End of Day

- Turn off and unplug all non-essential electrical and heating equipment
- Empty bins and ensure the clinic is left tidy
- Ensure any chemicals/cleaning material are safely stored
- Ensure windows and doors are lock
- Record you are leaving

THE MARKLAND METHOD

WEEKLY CHECKLIST

DEBT COLLECTION

RESPONSIBLE: FRONT DESK

Debt Recovery is best solved with a payment process and commitment which doesn't allow debt to accumulate

1

STEP ONE

Run debtors report

2

STEP TWO

All clients whose debt is 7-30days receive a weekly email to chase debt with invoices and all payment options and details included

3

STEP THREE

All clients whose debt is over 30days will have x1 phone call and if no response will be sent a letter before action

4

STEP FOUR

Check the account if any reason for uncertainty refer to the Management team

- If debt for an IA was not attended write it off
- Telephone anyone who has gone over 30days and not yet been sent a letter before action
- For all others send a letter before action

5

STEP FIVE

If no response to the letter before action (LBA)

- If there is no payment after a further 30day from LBA and the invoice value less than £X - consider writing off if the cost, if further action outweighs the invoice value
- If the invoice value is more than £X discuss with the manager

COMMUNICATION CHECK

RESPONSIBLE: FRONT DESK

Debt Recovery is best solved with a payment process and commitment which doesn't allow debt to accumulate

1

2

3

4

5

STEP ONE

Phones

- Call all clinic phone nos to check working
- Confirm phones rings for 20secs before going to divert
- Contact IT helpdesk for all errors

STEP TWO

Check website

- Check website is working and no error messages
- Complete webform's on the contact us page, check message comes through to email
- If not working contact IT helpdesk

STEP THREE

Emails

- Send a test email to clinic address
- If not working contact IT helpdesk

STEP FOUR

Check Diary Software working

- Contact the software management team for any issues (ensure they provide a back up)

STEP FIVE

Run weekly backup of computers and database

- •T helpdesk can provide

ANNUAL LEAVE APPROVAL

RESPONSIBLE: MANAGER

This example will vary depending on your contracts of employment and is here to show you an example process

1

2

3

4

5

STEP ONE

The annual leave year runs from the start to end of the financial year.

- Leave is worked out in hours
- All Annual Leave requests must be submitted and approved

STEP TWO

6 weeks' notice is required for any proposed holiday dates and the Business Manager must agree these in advance.

STEP THREE

Confirm no more than 10 days' holiday may be taken at any one time unless prior consent is obtained.

STEP FOUR

Cannot carry more than 2 days of untaken holiday entitlement forward from one holiday year to the following holiday year. These days must be used within the first three months of the following calendar year or they will be lost.

STEP FIVE

Lieu

- Is only given by agreement with the Business Manager and must be ideally taken within
- 2 week's in which it was accrued

WEEKLY BOOKEEPING

RESPONSIBLE: BOOKKEEEPER

This example will vary depending on your contracts of employment and is here to show you an example process

1

STEP ONE

Bank statements updated in Xero/Quickbooks
All invoices uploaded
All invoices uploaded
Xero/Quickbooks reconciliation

2

STEP TWO

Aged payables
Aged recievables

3

STEP THREE

Complete cash flow forecast

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MONTHLY CHECKLIST

DIARY SET UP

RESPONSIBLE: FRONT DESK

1

STEP ONE

Check the following are in the diary to ensure hours and appointment availability are accurate.

- Weekly team meetings
- 1:2:1 monthly
- Quarterly Objective Setting
- Training
- Annual Leave
- Public Holiday's

ORDERING

RESPONSIBLE: FRONT DESK

1

2

3

STEP ONE

Reception has the authority to purchase frequently ordered items up to the total value of £X pcm. If the total order is going to be over £1Xpcm requires approval from business manager.

STEP TWO

There is a monthly ordering list with frequently purchased item details including

- Supplier
- Codes
- Contact details
- Budget

STEP THREE

Confirm stock or products that need ordering. If inline with the budget place the order and submit an invoice to the bookkeeper.

If above budget seek another provider if essential or consent from business manager with rational as to why required

MONTHLY BOOKEEPING

RESPONSIBLE: FRONT DESK

1

STEP ONE

Regular payments made
Transfer to profit, tax, operations, and owners pay accounts

2

STEP TWO

Complete balance sheet
Update profit and loss
Budget review and update

THE MARKLAND METHOD

QUARTERLY CHECKLIST

NOTES AUDIT

RESPONSIBLE: MANAGER

At random the Clinic Manager selects 3 sets of notes from each clinician

- They get scored with the notes audit tool -with a max of scoring 16 points.
- All clinicians should be scoring 16
- Results then get discussed in the 1:2:1 Manager, what needs to be improved and easier more rapid ways of documenting according to legal requirements.

The Notes Audit covers:

- Consent documented
- Clear with time periods and mechanisms
- Upto date PMH
- Red Flags cleared
- Other reports documented with dates
- DHx
- SHx with PE
- Clear agreed goal
- Clearly documented location and description of Sx
- Agg'swith time frames
- Eases with timeframes
- Special questions cleared
- Clear objective marker
- Diagnosis
- Treatment program documented so a different therapist can reproduce
- Plan identified

THANK YOU