Setting up Google Calendar for Managers

https://support.google.com/calendar/answer/37095?hl=en&ref_topic=3417969

Add these events:

Yearly:

- ✔ Insurance fee schedule update
- ✔ Update CDT codes and schedule a team update
- ✔ End of year close outs
- ✔ Employee evals
- ✔ Goal planning for next year
- ✔ Xray machine maintenance
- ✔ Evaluate referrers and evaluate reward system
- ✔ Review internal credit guidelines
- ✔ Review OSHA with team – documents signed by members that they received training
- ✔ Review HIPAA with team – documents signed by members that they received training
- ✔ Hepatitis titers check up
- ✔ Review emergency situation protocol
- ✔ Active shooter training as recommended by law enforcement
- ✔ Evaluate credit card processing rates
- ✔ Schedule lunch & learn with systems already in use to learn about updates (CareCredit, implant companies, laser company, Sonicare/Oral-B, software training, clear aligners, etc.) ✔ Run code utilization report
- ✔ Personnel policy update
- ✔ Revisit marketing plan

Monthly:

- ✔ Close out month on practice management system (if applicable)
- ✔ Review numbers/goals with team
- ✔ Review Accounts Receivable report
- ✔ Review New Patient report and Referral reports
- ✔ Review unscheduled treatment report
- ✔ Complete monthly metrics monitor or review dashboard metrics
- ✔ Check in w/ hygiene department for any concerns
- ✔ Check in w/ clinical lead that back office tasks are done (sterilizer monitor, compressor maintenance, emergency kit current, sharps disposals)
- ✔ Check in w/ clinical lead that inventory is appropriate
- ✔ Schedule meeting w/ doctor to review any team updates
- ✔ Doctor to meet w/ assistants to discuss changes/concerns

Bi-weekly:

- ✔ Claims not sent to insurance
- ✔ Insurance aging report
- ✔ Payroll
- ✔ Review missed appointments/no-shows – is there an issue?

Ongoing:

- ✔ Add CE events
- ✔ Track employee vacations and days off
- ✔ Add an entry into managerial log whenever you document a situation
- ✔ Statements (daily is recommended)
- ✔ Doctor to meet w/ hygienists to go over periodontal protocol (quarterly)
- ✔ Evaluate lab bill for changes in pricing structures (quarterly)

You can set up each entry with a reminder to be sent to your email. I would set this as one of your home pages in your browser so that its open all the time. You can also sync it with your phone. You can set up a calendar for just you and your doctor and share with it with him/her. Some offices have set up calendars for the team with all team members receiving reminders about events (such as CE or maintenance due dates like sterilizer monitor or sharps disposal). Be as creative as you'd like –you can have more than one calendar!

