

Dental Bookkeeping and Data Entry SOPs

Table of Contents

Introduction	<i>intro.doc</i>
Chapter One	
Strategic Planning for Peak Performance, Service, and Profits	<i>chap1.doc</i>
The SOPs Productivity Pyramid	
Level 1: Mission and Objectives	
Level 2: Teamwork	
Level 3: The Service Cycle and the “Nine Moments of Truth”	
Chapter Two	
Building Your Own SOPs Productivity Pyramid	<i>chap2.doc</i>
Step 1: Read This Book	
Step 2: Prep Questions	
Step 3: Get Team Support	
Step 4: Supplies	
Step 5: Choose a Strategy	
Step 6: Use Meetings and Work Sessions to Complete Each Level of the Pyramid	
Step 7: Monitor Work Progress	
Step 8: Support and Appreciate Your Team’s Efforts	
Step 9: Assemble and Review the Final Product	
Step 10: Reward Yourself and Your Teammates	
Chapter Three	
A SOP for SOP-Building	<i>chap3.doc</i>
Standard Operating Procedure for Creating Your Own SOPs Manual	
Getting Started	
Session One: Present the Project to the Team	
Session Two: Mission Statement and Objectives	
Session Three: Teamwork	
Session Four: Analyzing Your Service Cycle—The “Nine Moments of Truth”	
Session Five: Divide and Conquer	
Session Six: A SOPs Workshop	
How to Write a SOP	
Sample SOP Swap Label	
SOPs Checklist	
Session Seven: Another SOPs Workshop	
Session Eight: Assembling Your Procedures Manual	
Session Nine: Celebrate!	
Mission Statement	
Mission Statement Questionnaire	<i>msquest.doc</i>
Sample Mission Statement	<i>sampms.doc</i>
Desired Outcome Fulfills the Mission Statement	<i>desirems.doc</i>

PERFORMANCE AGREEMENTS

Introduction and Instruction	<i>paintro.doc</i>
Patient Account Administrator	<i>paactadm.doc</i>
Task Inventory: Business Department	<i>tskinvbus.doc</i>

STANDARD OPERATING PROCEDURES

Bookkeeping and Data Entry SOPs Project Flow Sheet	<i>bkkpflow.doc</i>
Financial Arrangements	<i>finarrnge.doc</i>
Handling Patient Billing Questions	<i>spatqtn.doc</i>

Data Entry

Patient Accounts	<i>enteracct.doc</i>
Insurance Carriers	<i>inssetup.doc</i>
Insurance Matrix	<i>insmatrix.doc</i>
Posting Charges and Payments	<i>posting.doc</i>
Processing Refunds	<i>srefund.doc</i>
Non-Sufficient Funds Notice	<i>nsfnotice.doc</i>
Referring Accounts to Collection	<i>scolec.doc</i>
Pre-Determinations	<i>predetrm1.doc</i>
Day-End Procedures	<i>dayend.doc</i>
Month-End Procedures	<i>mnthend.doc</i>
Year-End Procedures	<i>yearend.doc</i>
Patient Statements	<i>statmts.doc</i>
Electronic Claims Submission	<i>sdatecs.doc</i>
Paper Insurance Claims	<i>printins.doc</i>
Insurance Claim Follow-Up	<i>trackins.doc</i>
Secondary Insurance Claims	<i>secndins.doc</i>

FORMS

SOPs Worksheet	<i>sopwk.doc</i>
Practice Advisors and Vendors	<i>advisors.doc</i>
Authorization for Credit Card Automatic Deduction	<i>authcc.doc</i>
Treatment Estimate	<i>txest.doc</i>
Hygiene Fee Information Sheet	<i>hygslip.doc</i>
Daily Deposit Recap and Cash Recap Worksheets	<i>dailytotal.doc</i>
Petty Cash Reconciliation Log and Worksheet	<i>pettyca.doc</i>