

Morning Huddle Report Form

Doctor (name)

Monthly production goal:
\$ _____

Monthly production actual:
\$ _____

Plus/minus goal: \$ _____

Daily adjusted production goal:
\$ _____

Scheduled today: \$ _____

Doctor or hygienist (name)

Monthly production goal:
\$ _____

Monthly production actual:
\$ _____

Plus/minus goal: \$ _____

Daily adjusted production goal:
\$ _____

Scheduled today: \$ _____

Doctor or hygienist (name)

Monthly production goal:
\$ _____

Monthly production actual:
\$ _____

Plus/minus goal: \$ _____

Daily adjusted production goal:
\$ _____

Scheduled today: \$ _____

Collections monthly practice goal

Monthly collections goal:
\$ _____

Monthly collections actual:
\$ _____

Plus/minus goal: \$ _____

New patients monthly practice goal

Monthly new patient goal: _____

Monthly new patients actual: _____

Plus/minus goal: _____

Front desk

1. Did any patients leave without scheduling their next hygiene appointment? If so, and they should have been scheduled, follow up and get them scheduled as soon as you can.
2. Are there unconfirmed patients 48 hours out? If so, decide as a team what needs to be done. Do you make multiple calls for the next 48 hours until confirmed? Do you do nothing because a patient is known to be responsible and reliable? Do you double book? Each patient is different. Do not be afraid to call multiple times if a patient has cancelled before.

3. Were there any last-minute calls from patients that led to changes in today's schedule?
4. Do any of the day's patients have outstanding balances?
5. Who are the new patients that day? Do you have the proper information about them?
6. Is there any personal information about patients that should be known, i.e., upcoming vacations, birthdays, etc.?
7. Are there any openings today in the doctor/hygiene schedule? What are the solutions?
8. What is the financial information on today's patients? Are there financial arrangements needed? Does anyone have a poor payment history? etc.
9. Did any patients leave the office yesterday without paying their balance in full?
10. Which patient should receive a quality control survey today?

7. Have all lab cases for the day been checked in?
8. Are photos needed for any patients?
9. Are any family members overdue for recare?

Previous open day

1. Did anything go wrong?
2. What went right?

Back office

1. Is there enough time scheduled for each procedure?
2. Are there adequate supplies available?
3. Do you need premedication information about a patient or any other pertinent medical info, such as allergies, etc?
4. Do any patients need additional x-rays?
5. Is there any pending treatment for any of today's patients that can be added to the schedule to fill in for cancellations or no-shows if needed?
6. When can emergencies be scheduled?