MORNING MEETING AGENDA

Today's Date _____

Daily goal	$	Monthly Goal	$	Next hygiene opening		New patient goal for the month	
Daily scheduled production	$	Monthly scheduled production	$	Next Doctor opening		New patients scheduled month to date	

Format

- **Administrative Team Member opens the meeting with:**
    - Daily production schedule
    - Progress toward goal
    - Any financial challenges and patients who need to meet with them
    - Next available DDS and RDH opening
    - Patients who should not be pre-scheduled (chronic N/S)
    - Targeted patient(s) to ask for referrals

- **RDH summarizes daily patients and identifies:**
    - Any changes (no x-rays needed, pcht needed, etc.)
    - Outstanding treatment
    - Patient who needs to be transitioned into a perio code, allowing the Doctor to be prepared
    - When support is needed (i.e.: pcht to allow the patient an opportunity to hear the numbers and engage more fully in their care)
    - Anything of personal note to celebrate with the patient (birthday, etc.)
    - New patients – notes who they were referred by, any special concerns

- **Dental Assistant summarizes daily patients in the restorative column and identifies:**
    - Any changes to treatment listed

- o Notes any crown/bridge prep in need of a BWX or IO photo prior to starting treatment – all crown and bridge should have both on file before preps
- o Notes all cases to be seated are here or need immediate follow-up with lab
- o Identifies possible chair conversions (restorative patients due/overdue for a cleaning who may be able to take a last-minute no-show appointment)
- o Any challenges in the timing of the schedule
- o Anything of personal note to celebrate with the patient (birthday, etc.)

- **DDS**
  - o Selects the best time in the schedule for emergencies
  - o Ends the meeting on a positive note

Why?

- Create better organization in planning the day instead of just letting it happen
- Know patient needs in advance and can see that supplies and lab cases are present
- Confirm necessary supplies and all lab cases present
- Increase productivity and profitability by having the entire team aware of patients who have not scheduled. Using the information to motivate patients to accept treatment.
- Improve team morale by deciding who needs support throughout the day and assigning a person to assist. Additionally, an opportunity to greet each other!
- Effective handling of emergencies because the clinical team is involved in selecting the best time
- Team is better informed of daily production goals; this reinforces team efforts to meet and exceed those goals

How?

- Doctor to lead prior to the first patient appointment of the day
- Entire team required to attend
- Accomplished in approximately 15 minutes
- Clinical team has previously reviewed patient charts for the day's treatments, outstanding treatments, and lab cases
- Administrative team has checked messages and updated the schedule with any changes
- Each team member has an updated copy of the schedule for their notes