Modern Staffing Cheat Sheet Cheat Sheet

by adagion via cheatography.com/61890/cs/15942/

Leveraging Technology

Administrative tasks can be handled virtually via phone or online private branch exchange (PBX) system

Benefits

Office Space	A virtually distributed staff means saving on the cost of having more office space
Billing & Administration	Handled offsite, removing the need for a front desk
Scheduling	Virtual scheduling saves time for both your staff and patients
Communication	Calls and emails are set up to be made and returned at specific times of the day instead of having to be preformed manually by staff
Records	Cuts back on paper and the need for a filing system
Labs	Kits can be drop-shipped from the lab directly or you can send patients to LabCorp or Quest blood draw stations

Benefits (cont)

Supplements	Drop-ship directly from vendors instead of stocking in office

Essential Staff

These three roles are the key to keeping your practice operating smoothly and efficiently while allowing you to focus on your patients

Bookkeeper

Keeps finances in order. Requires someone who is reliable, trustworthy, and familiar with newer online tools

Practice Manager

Handles all back-end administrative functions (creating systems, ordering labs and supplements, setting up accounts with vendors, and managing the electronic health record and billing responsibilities) in addition to making strategic decisions about the practice. Must be extremely detail oriented and organized

Patient Navigator

Handles patient onboarding, ordering supplements and labs, processing charts, and communication. Fields and screens patient questions, mediates disputes, and provides moral support. Requires someone that is empathetic, compassionate, and emotionally mature with excellent written and verbal communication skills

Optional Staff

In addition to essential staff, there is a range of part-time independent contractors that you might want to consider

Roles

Graphic Designer	Designs brand identity (business cards, website, etc.)
Developer/IT Support	Back-end website development, sets up staff email addresses, software support, hardware set-up
Tax Prep & CPA	Prepares taxes and consults on bigger strategic questions as the practice grows
Human Resources	Manages HR-related issues in the practice
Business Attorney*	Helps with incorporation, draws up contracts for independent contractors and employees, and answers any questions related to business issues

Roles (cont)

Healthcare Attorney*	Helps with documentation (informed consent, arbitration agreements, documentation related to insurance billing, etc.)

*Services such as Rocket Lawyer offer a subscription for access to attorneys at a cheaper rate than hiring hourly

Allied Health Professionals

Utilizing allied health professionals gives patients a full-care experience while cutting down on practice cost. These allied providers play a role in four key areas

Coaching Sessions Between Appointments

Health coaches specialize in keeping patients on track, and provide empathy and support. These check-ins can significantly improve compliance, and higher patient and clinician satisfaction. You don't necessarily need a licensed provider to do these appointments

Follow-up Visits

These visits can be done by an NP, PA, health coach, or nutritionist. If you are discussing lab results, making diagnoses, and prescribing treatment, this requires a PA or NP; if you are simply covering diet, lifestyle, and behavioral modifications, this could easily be a health coach or a nutritionist

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Group Visits

Group visits leverage the provider's time to serve more people and also offer much needed community and connection for patients suffering from chronic illness

Patient Portal

An NP or PA would be needed to handle prescription refills and other tasks requiring a license, but nutrition, lifestyle, and basic protocol questions can be handled by health coaches or nutritionists

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