

Clinic Management Pack: SOPs + Training + Weekly Ops

A management system to keep quality stable even when staff changes.

1) SOP sprint (5 workflows in 1 week)

SOPs must be QA-able. Otherwise they are essays.

Day	Outcome
1	Record each workflow (screen walkthrough)
2	Convert to bullet SOP + checklist
3	Add QA sampling rules
4	Assign owners + escalation rules
5	Launch + refine based on misses

2) Training system (prevents drift)

Week	Training focus
1	SOP reading + shadowing + daily QA feedback
2	Supervised execution + KPI review
3+	Independent execution + QA sampling

Operator hack: Build a short role-play test (5 minutes) for each role so 'good' is measurable.

3) Role-play test examples (copy/paste)

Role	Test prompt
Front desk	Capture insurance fields from a sample card + explain what you'd verify
Billing	Categorize 5 denials and propose root causes + fixes
Coder	Choose modifier for a scenario and explain documentation needed

4) The 15-minute weekly ops meeting

Minute	Agenda
0–3	KPI glance: rejections, denials, AR 60+, no-show
3–8	Biggest blocker + root cause
8–13	One fix this week (update SOP/checklist)
13–15	Owners + due dates

Rule: If it isn't owned, it isn't real.