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Inside this issue

The Silent Revenue Killers in Your Practice

Spot the hidden issues draining your bottom line—and fix them fast.

Medical practices don't usually lose money in loud, obvious ways. Instead, revenue often slips away quietly, in the form of overlooked details, inefficient processes, or unchecked habits. These "silent revenue killers" don't show up in bold red numbers—but they add up quickly.

Here are seven of the most common stealthy culprits—and what you can do to stop the bleeding.

1. Coding Delays and Errors

You might be doing the work, but you're not getting paid for it—yet.

The issue: Incomplete or inaccurate documentation leads to coding delays, undercoding, or claim denials. Even small lags in coding can delay revenue by weeks.

Fix it:

- Implement same-day chart completion policies.
- Use coding checklists or AI-assisted tools to catch common omissions.
- Conduct monthly audits to identify repeat errors or

continues on page 2

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The Silent Revenue Killers in Your Practice

continued from page 1

education gaps among providers.

2. Uncollected Copays and Deductibles

This is money you're owed—by contract.

The issue: Front desk staff often feel awkward asking for copays, or the workflow doesn't prioritize collection. Over time, these small amounts snowball into large losses.

Fix it:

- Set clear expectations: "We collect all copays at the time of service."
- Offer digital pre-check-in and payment links.
- Train staff on how to confidently handle patient objections ("Would you like to pay with the card on file today?").

3. Referral Leakage

Patients referred out for tests or specialists may not return—and your revenue goes with them.

The issue: Without tracking referral follow-through, you risk losing ongoing care (and revenue) to competing practices or hospital systems.

Fix it:

- Use referral tracking software or EHR tools.
- Designate a referral coordinator.
- Follow up with patients: "Did you get your referral scheduled?" It's good care—and good business.

4. No-Show Appointments

Every missed appointment is missed revenue—and missed opportunity.

The issue: Even a 5–10% no-show rate can lead to significant monthly losses, especially if you don't have a system for backfilling appointments.

Fix it:

- Use automated reminders by text, email, and phone.
- Offer waitlists or same-day call-in opportunities.
- Consider a modest no-show fee policy—with proper legal and payer guidance.

5. Underutilized Schedulers

If your schedule looks full but your providers aren't, you've got a mismatch problem.

The issue: Some schedulers book without considering the optimal mix of appointment types or the full scope of services a provider offers.

Fix it:

- Analyze scheduling patterns monthly: Are providers overbooked with short visits and underbooked with high-revenue services?
- Train schedulers to prioritize revenue-driving procedures or services within allowed guidelines.
- Regularly adjust templates to match demand and provider availability.

continues on page 3

The Silent Revenue Killers in Your Practice

continued from page 2

6. Aging A/R That Slips Through the Cracks

Once a claim is 90+ days out, your chances of getting paid shrink fast.

The issue: Follow-up on unpaid claims and patient balances isn't always timely—especially when teams are short-staffed.

Fix it:

- Review A/R aging reports weekly.
- Use A/R dashboards to flag high-value or old claims.
- Designate a specific person or team for focused follow-up.

7. Staff Turnover (and Training Gaps)

Every time you lose a staff member, you lose knowledge—and potentially, income.

The issue: Gaps in front desk or billing team training can lead to registration errors, missed authorizations, and costly delays.

Fix it:

- Document SOPs for billing, coding, front desk, and scheduling processes.
- Create a short, role-specific onboarding checklist.
- Invest in ongoing training—even 30 minutes a month can pay off.

Bottom Line: What You Don't See Can Hurt You

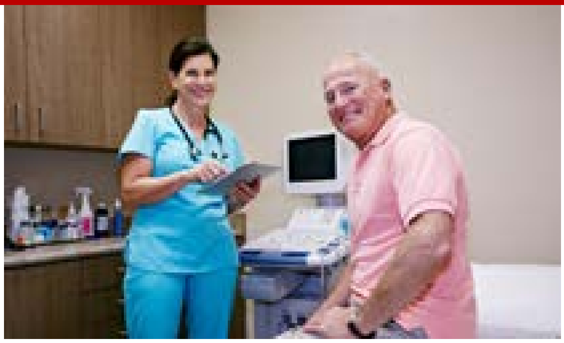
These silent revenue killers often hide in plain sight. By shining a light on the small gaps in processes, communication, and training, you can recover lost income and tighten up your practice's financial health—without seeing more patients or raising your rates.

Action step: Pick one of the issues above and audit your practice this month. You might be surprised how much money is sitting just beneath the surface. ■

A Medical Office Wish List—From the Patient's Perspective

Let's be honest—going to the doctor's office isn't usually the highlight of anyone's day. But it *can* be a lot less stressful, a lot more convenient, and even a little more pleasant when a practice is tuned in to what patients actually want.

As a medical office manager, you're in a unique position to make changes that truly impact the patient experience. And while every patient is different, there are some common themes that come up again and again when people talk about what they wish their doctor's office offered. Let's take a look.



1. Online Scheduling That Actually Works

Patients are tired of waiting on hold just to book an appointment. Offering online scheduling—where they can see open slots in real time and book instantly—ranks high on most people's wish lists. Bonus points if they can cancel or reschedule online, too.

And while you're at it, make sure the system is mobile-friendly. If it's clunky on a phone screen, it defeats the purpose.

2. Clear, Upfront Pricing Information

Even insured patients often feel in the dark about what services will cost. Nobody wants a surprise bill. When possible, offer estimates for common services, co-pays, or lab fees right on your website or through your patient portal. Transparency builds trust.

continues on page 4

A Medical Office Wish List—From the Patient's Perspective

continued from page 3

3. Shorter Wait Times and Better Communication When There's a Delay

No one expects doctors to be exactly on time every time—but they do appreciate honesty. If there's going to be a delay, let patients know. A simple text or front desk heads-up goes a long way toward managing expectations.

4. Comfortable, Calm Waiting Rooms

Patients notice the little things: lighting, cleanliness, available seating, noise levels. Think of your waiting room like the front porch of your practice—it's the first impression. Consider a few simple upgrades:

- Charging stations for phones
- Soft lighting and calm music
- Water or coffee station
- Kid-friendly options if you see families

5. Better Use of Patient Portals

Many practices *have* a portal, but don't use it to its full potential. Patients love the convenience of viewing lab results, messaging the office, accessing visit notes, and requesting refills without making a phone call.

Help patients get signed up and make sure your staff encourages its use.

6. Follow-Up Communication

A follow-up call, text, or email after a visit—especially if the patient had a procedure or was treated for something more serious—makes people feel cared for. It doesn't have to be long or complicated. Even a short message like "Just checking in—how are you feeling after your visit with Dr. Lee?" can make a big difference.

7. Evening or Weekend Hours

Many patients work 9 to 5, which makes weekday appointments difficult. Offering early morning, evening, or limited weekend slots—maybe even just once a week—can set your practice apart.

8. More Empathy, Less Rush

Patients often feel like they're being hurried through their visits. They want to feel *heard*, not herded. You can support this by ensuring providers aren't overscheduled, but also by training front desk and support staff to greet patients warmly, make eye contact, and treat each person like a priority.

9. Educational Materials They Can Actually Use

People leave appointments with questions all the time. Providing printed or digital handouts about their condition, medication, or upcoming procedures helps patients feel more in control—and reduces unnecessary callbacks to the office.

10. Inclusive and Accessible Services

Patients with disabilities, those from diverse backgrounds, and individuals who speak languages other than English all appreciate signs that your practice is welcoming and prepared to meet their needs. This might include:

- Translation services
- ADA-compliant facilities
- Gender-inclusive intake forms
- Visual aids for those with hearing impairments

The Bottom Line: Patients want convenience, comfort, clarity, and compassion. And while you can't change everything overnight, even a few improvements can transform how people experience your office. By tuning in to what patients wish for, you're not just keeping them happy—you're building a practice they'll want to return to and recommend to others.

Let their wish list guide your to-do list. ■

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MANAGER'S TOOLBOX

CHECKLIST: 7 November Tasks for a Smooth Finish to the Year

As the end of the year looms, November is a perfect month to dive into key tasks that will set your medical office up for a productive finish and an even better start to next year. With the holidays around the corner, it's all about checking off high-impact items before things get even busier. Here are some essential areas to tackle this month.

☑ Year-End Financial Review

Begin by reviewing your budget and financial reports. Are there any pending invoices or payments that need to be addressed? Now is also a good time to evaluate your office's financial health and set any goals for next year. Look

at expenses, check any tax-deductible purchases you might want to make before year-end, and make sure everything is up-to-date for tax season. A thorough review will help you identify areas where you can streamline or reallocate funds to get the most out of your budget in the months ahead.

☑ Staff Scheduling for the Holidays

With the holidays approaching, you'll likely need to adjust schedules and coordinate time off requests. Creating a clear, well-communicated holiday schedule in advance not only reduces stress but also ensures you'll have adequate coverage to meet patient needs. A staff meeting or group email to go over holiday hours, protocols for on-call shifts, and the coverage plan can keep everyone on the same page and minimize any last-minute hiccups.

☑ Check Inventory and Supplies

Take an inventory of all essential supplies and order items that might run low over the holiday season. From medical supplies to office essentials like paper and toner, making sure you have enough stock through December will prevent any unexpected shortages. This is also a great time to negotiate any bulk discounts with suppliers if you anticipate large orders.

☑ Patient Outreach and Engagement

November is a great time to engage with patients, reminding them about end-of-year

appointments and procedures they may need to schedule. Insurance benefits often reset in January, so many patients will appreciate a gentle reminder to make the most of their benefits while they can. Outreach can be as simple as sending emails, posting reminders on social media, or even making a few friendly phone calls.

☑ Prep for 2025 Strategic Planning

Start planning for the coming year by evaluating what went well this year and where you could improve. Involve your team by gathering feedback on what they think should be added or adjusted. Begin drafting a strategic plan with input from key staff members, setting goals for patient care, process improvements, and staff development.

continues on page 6

MANAGER'S TOOLBOX CHECKLIST: 7 November Tasks for a Smooth Finish to the Year

continued from page 5

☑ Catch Up on Training and Certifications

With a slightly slower pace before December, now is a good time to make sure everyone's certifications are up-to-date. This could mean scheduling CPR refresher courses, HIPAA compliance training, or software proficiency workshops. If there's budget left, consider investing in some professional development for your team—they'll appreciate the opportunity, and it could boost morale and skill sets going into the new year.

☑ Office Maintenance and Organization

Finally, take a look at your physical space. Could your waiting room use some sprucing up? Are there any repairs or updates that should be scheduled before winter? A little maintenance can make a big difference in the look and feel of your office, creating a welcoming space for patients and an organized, functional area for staff. A mini "fall cleaning" will help keep everything in order for the busy months to come.

With these tasks in your November plan, you're well on your way to ending the year on a high note. Taking time to address these areas now means less to worry about in December and more time to focus on providing exceptional care for your patients and a balanced schedule for your team. ■

How to Use Skills Tests in the Hiring Process

Hiring the right person can make or break a team's success. Resumes and interviews only reveal part of the picture—sometimes the best way to evaluate a candidate's potential is to see their skills in action. That's where skills tests come in. If you're involved in the hiring process and want a practical way to assess real capabilities, this primer will walk you through how to establish job requirements, choose the right type of test, find useful tools, and make the most of this powerful hiring strategy.

Step 1: Define What the Job Actually Requires

Before you can assess anyone, you need to get crystal clear on what you're hiring for. This isn't just about listing qualifications or degrees—it's about understanding the real, everyday tasks of the job.

Ask yourself:

- What does success in this role look like?
- What tasks does this person need to be able to perform on day one?
- What tools or software do they need to know?
- Are communication or problem-solving abilities critical?

Use these answers to break the role down into must-have and nice-to-have skills. For example, if you're hiring an administrative assistant, must-haves might include proficiency in Microsoft Office, calendar management, and written communication. Nice-to-haves might be experience with CRM software or social media scheduling.

Step 2: Choose the Right Kind of Test

Once you've nailed down what

continues on page 7

How to Use Skills Tests in the Hiring Process

continued from page 6

you're looking for, match those requirements with the right types of tests. Here are a few common categories:

- **Technical skills tests –** Great for roles involving software, data entry, or specific tools. These tests might include typing speed, Excel functions, or QuickBooks proficiency.
- **Situational judgment tests –** These assess how a candidate might respond to work scenarios. Useful for customer service, administrative, or supervisory roles.
- **Cognitive ability tests –** These measure problem-solving, reasoning, or attention to detail. Best for positions that require multitasking or analytical thinking.

- **Writing and communication tests –** Especially helpful if the role involves crafting emails, taking minutes, or preparing reports.
- **Soft skills assessments –** These can evaluate things like teamwork, adaptability, or leadership. While more subjective, they're useful in customer-facing or collaborative roles.

Step 3: Choose Tools That Match Your Budget and Needs

The good news is, you don't need a massive HR budget to do this well. There are plenty of user-friendly, affordable platforms that allow you to build or use pre-made skills tests. Here are a few to explore:

- **Indeed Assessments –** Free and built into the job posting platform.
- **TestGorilla –** Offers a wide variety of pre-built tests and lets you combine them into hiring funnels.
- **SkillSurvey –** Focuses more on behavioral and reference checking, with some skill components.
- **Vervoe –** Customizable assessments that simulate real tasks.
- **Typing.com or TypingTest.com –** Free and simple if you just need a typing speed test.

Don't overlook the DIY route, either. You can create a short assignment or simulation based on a real task they'd encounter in the job. Just make sure it's reasonable in scope—don't ask someone to do an hour of unpaid work.

Step 4: Make It Fair and Job-Relevant

Skills testing should always be relevant, respectful, and non-discriminatory. Avoid overly complicated tasks that don't

relate directly to the job. And be transparent with candidates—tell them why you're testing and how their performance will be used in the hiring process.

Also, make sure you're evaluating consistently. Use a scoring rubric or rating system so you're comparing apples to apples, not relying on gut instinct.

Step 5: Combine Test Results with Everything Else

Skills tests are a valuable part of the puzzle, but not the whole picture. Use them in combination with interviews, reference checks, and other hiring steps. A candidate who's a little slower on a software test might shine in their adaptability or people skills—and vice versa.

Final Thought: It's Not Just About Screening—It's About Success

Skills testing isn't just about filtering people out. It's a tool to help you hire smarter, reduce guesswork, and set your new hire up for success. By making this part of your hiring process, you're not just choosing the right person—you're giving them the chance to show you what they can really do.

And for an office manager juggling ten things at once, that kind of clarity is gold. ■

TikTok, Yelp & Online Reviews: What Managers Should (and Shouldn't) Do

Protecting your practice's reputation in the age of social media.

In today's digital world, a patient's first impression of your medical practice may not come from your website or a phone call—it might come from a TikTok video, a Yelp review, or a Google star rating. Whether it's a glowing recommendation or a critical comment, online content can shape public perception and impact patient volume more than ever before.

As a medical office manager, you're not just overseeing staff and schedules—you're also the front line of brand protection. Here's what you **should—and shouldn't—do** when managing your practice's online reputation.

DO: Regularly Monitor Your Online Presence

Why it matters:
Patients search before they schedule. Studies show that a majority of people look at online reviews before choosing a healthcare provider—and many won't consider practices with fewer than four stars.

How to do it well:

- Set up Google Alerts for your practice name and provider names.
- Check platforms like Yelp, Google Reviews, Healthgrades, Zocdoc, and Facebook weekly.
- Assign someone (or yourself) to track this regularly and report anything urgent.

DON'T: Respond Emotionally (or Violently Break HIPAA)

Why it matters:
It's tempting to defend your team against an unfair review—but a defensive or angry reply can damage your reputation even more.

Avoid at all costs:

- Never confirm someone is a patient in your response (even if they said it first).
- Don't share any medical details.
- Don't argue, blame, or post screenshots of records or internal notes.

Instead, try:
"Thank you for your feedback. We take patient concerns seriously and invite you to contact our office directly so we can address this matter privately."

DO: Encourage Satisfied Patients to Leave Reviews

Why it matters:
Happy patients often stay silent. If you don't ask, your reviews may only reflect complaints—not the full story.

How to do it ethically:

- Use a follow-up email or text after visits with a polite ask: "If you had a good experience, we'd appreciate a quick review!"
- Include links to your review profiles (Google, Yelp, etc.).
- Don't offer incentives—that's unethical and may violate platform policies.

DON'T: Post Fake Reviews or Pay for Them

Why it matters:
Some companies offer to "fix" your online reputation with fake reviews. That's risky and unethical—and can get your listings removed or flagged.

continues on page 9

TikTok, Yelp & Online Reviews: What Managers Should (and Shouldn't) Do

continued from page 8

Better idea:
Focus on the long game. A steady stream of authentic, positive reviews builds credibility over time.

DO: Use Negative Feedback as a Learning Tool

Why it matters:
A bad review can sting—but it's often a window into real patient frustrations.

How to leverage it:

- Look for patterns. Do multiple people mention long wait times, rude staff, or billing confusion?
- Use this feedback in team huddles or training sessions.
- Fix root causes, not just the symptoms.

DON'T: Try to Silence or Threaten Reviewers

Why it matters:
Threatening patients with legal action for a bad review can backfire and draw more attention to the criticism.

Instead:

- Maintain professionalism.
- Let a lawyer weigh in only if a post contains defamatory or completely false claims—not just bad opinions.

DO: Claim and Optimize Your Profiles

Why it matters:
If you don't manage your listings, someone else—or no one—will.

How to do it:

- Claim your Google Business Profile, Yelp page, Healthgrades listing, etc.
- Update office hours, contact info, services offered, and photos.
- Make it easy for patients to find accurate info wherever they look.

What About TikTok?

More and more healthcare content is showing up on TikTok and Instagram—sometimes from your own patients or staff. This can help or hurt your brand.

Smart policies:

- Have a clear social media policy for staff: what's allowed, what's not.
- Never post anything patient-related without explicit written consent.
- If patients post about your office, don't engage unless it's positive and public.

Final Thought: Be Proactive, Not Reactive

Online reviews and social content aren't going away. Rather than fear them, use them as tools to understand how patients perceive your practice—and to build a stronger, more responsive team culture.

Your reputation isn't just your star rating—it's how you handle feedback. ■

8 Office Time-Saving Hacks from Other Managers

When you're running a busy medical office, every minute counts. Between managing staff schedules, handling patient concerns, processing insurance claims, and keeping the front desk running smoothly, there's little room for inefficiency. That's why we reached out to experienced medical office managers across the country to share their best time-saving strategies—the real-life hacks that keep their practices running like clockwork.

Here's what they had to say:

1. The Color-Coded Calendar System

"Color-coding changed everything."
— Jennifer L., Practice Manager, Raleigh, NC

Jennifer uses a color-coded digital calendar (Google Calendar, synced with her EHR) to distinguish between provider schedules, room use, administrative tasks, and lab appointments. "It helps avoid double-booking and gives me a visual snapshot of where the day could bottleneck," she says.

2. 15-Minute Daily Huddles

"We start every day with a quick team check-in—no exceptions."
— Marco D., Clinic Coordinator, Austin, TX

A short daily huddle at 8:45 a.m. keeps everyone aligned on priorities, late patients, provider changes, and tech issues. "It prevents confusion and reduces the number of interruptions throughout the day," Marco explains. "It saves time in the long run because everyone's on the same page from the start."

3. Pre-Written Email & Phone Scripts

"You don't need to reinvent the wheel every time a patient calls."
— Sharon M., Office Supervisor, Denver, CO

Sharon created a shared document with scripts for common patient scenarios — rescheduling, prescription requests, billing inquiries, etc. "Staff feel more confident, and messages are more consistent. Plus, it cuts down training time for new hires."

4. Batch Work for Admin Tasks

"Multitasking is a myth—batching is better."
— Daniel K., Operations Lead, Chicago, IL

Daniel sets aside specific times during the day for batch tasks like insurance verifications, claim follow-ups, and supply ordering. "You lose momentum every time you switch tasks," he says. "By batching, I get more done in less time—with fewer mistakes."

5. Use "Do Not Disturb" Zones

"Give your staff permission to focus."
— Alicia T., Office Manager, Sacramento, CA

Alicia implemented a system where one admin team member at a time wears a "Do Not Disturb" lanyard for 30-minute blocks. During that time, they're allowed to finish high-focus tasks without interruptions. "It's a game changer for productivity—and morale."

6. Track Time-Wasters (and Fix Them)

"We ran a one-week audit—and it was eye-opening."
— Brian W., Practice Manager, Tampa, FL

Brian asked staff to jot down their biggest daily time-wasters for one week. Common culprits: unclear forms, patients with incomplete paperwork, phone tag with pharmacies. "Fixing just two of those issues saved us hours per week."

continues on page 11

8 Office Time-Saving Hacks from Other Managers

continued from page 10

7. Automate the Obvious

"Anything you do more than 3 times a day? Automate it."

— Kendra S., Multi-Specialty Clinic Manager, Seattle, WA

Kendra uses tools like appointment reminders, online intake forms, and automatic referral tracking. "It costs more upfront, but you get it back in time — and staff sanity."

8. End-of-Day "Reset" Ritual

"We don't leave until the day is reset."

— Tracy N., Front Desk Lead, Phoenix, AZ

Before clocking out, each team member takes 10 minutes to prep for the next day: restock, clear voicemails, tidy stations, and review tomorrow's schedule. "We walk into a clean slate each morning, not yesterday's mess."

Final Thought: Efficiency = Less Burnout

These hacks aren't just about saving time—they're about creating space. Space to solve problems proactively, to reduce errors, and to keep your team from running on fumes. Whether you implement one strategy or five, small changes can lead to big gains in both productivity and morale. ■

Got a time-saving hack of your own?

We'd love to hear it!
Email the editor: barb@medicalofficemanager.com to share your tip. We may feature it in a future article.

Take a Well-Deserved Break This Thanksgiving: How to Unplug and Recharge

With Thanksgiving coming up this month, it's time to think about how you'll step away from the demands of managing a busy medical office and truly enjoy the holiday. As a medical office manager, you're used to juggling responsibilities, solving problems, and keeping everything running smoothly. But even the best managers need a break, and Thanksgiving is the perfect opportunity to step back, recharge, and reconnect with what matters most. Here's how you can unplug from work while ensuring your office stays on track in your absence.

1. Plan Ahead for Peace of Mind

The key to truly unplugging is preparation. In the week leading up to Thanksgiving, identify any tasks or deadlines that can't wait until after the holiday. Delegate responsibilities to your team, and ensure everyone knows who is handling what. Leave clear instructions for any issues that might arise, and empower your staff to make decisions when necessary.

Set up an out-of-office email reply with specific details on when you'll return and who to contact in your absence. This small step sets boundaries and prevents unnecessary interruptions.

2. Communicate Your Intentions

Let your team, colleagues, and vendors know in advance

continues on page 12

Take a Well-Deserved Break This Thanksgiving: How to Unplug and Recharge

continued from page 11

that you'll be unplugging. This transparency not only shows your commitment to work-life balance but also encourages others to respect your time away. A quick email or meeting to share your holiday plans can help set expectations and reduce the likelihood of last-minute surprises.

3. Establish a Tech-Free Zone

It's tempting to check your email or respond to a quick message, but once you do, you're back in work mode. To avoid this, designate specific times or areas where work-related technology is off-limits. For example, decide that your phone stays in a different room during Thanksgiving dinner or set a rule to only check work emails once a day (if absolutely necessary).

4. Trust Your Team

You've worked hard to build a capable, dependable team. Trust them to handle the office while you're away. Micromanaging from a distance not only diminishes your ability to relax but also undermines their confidence. Give your team the opportunity to shine, and you might be surprised by how well they manage.

5. Focus on Gratitude and Connection

Thanksgiving is all about gratitude, so take time to appreciate the people and experiences around you. Whether it's spending quality time with loved ones, enjoying a favorite holiday tradition, or simply reflecting on your accomplishments, shifting your focus away from work can help you reset.

6. Resist the Guilt Trap

It's natural to feel a little guilty about stepping away, especially in a busy environment like a medical office. But remember, taking a break isn't just good for you—it's good for your office, too. A well-rested manager is more effective, creative, and supportive than a burned-out one.

7. Prepare for Your Return

Before you unplug, set yourself up for a smooth return. Create a prioritized to-do list for when you're back in the office, and resist the urge to schedule meetings or deadlines for the first day back. This will help you ease into work mode and avoid feeling overwhelmed.

8. Reflect on the Bigger Picture

The Thanksgiving holiday is a great time to think about why you do what you do. By stepping back from daily demands, you can gain a fresh perspective on your work and find renewed motivation to tackle challenges when you return.

Take the Break You Deserve

As a medical office manager, you're the glue that holds the office together, but even glue needs a rest to stay strong. By planning ahead, setting boundaries, and truly unplugging, you can make the most of your Thanksgiving holiday and come back refreshed and ready to lead. Remember, taking care of yourself is one of the best ways to take care of your team and your patients.

Happy Thanksgiving! ■