DIGITAL VISION · THE REVENUE WATERLINE AUDIT — DENTAL

The Office Manager's Efficiency Scorecard: _____ (practice name)

Eight places the front office loses time every week — find yours in five minutes. Completed by: _____ Position: _____

For each row, **tick one box in each of the three scored columns**, then add the three numbers for the row total.

#	WHERE THE TIME GOES	DOES IT ACTUALLY GET DONE?				HOW MUCH TIME DOES IT TAKE PER DAY?				DOES IT RUN WITHOUT YOU? IS THERE A PROCESS?					ROW TOTAL
		Often forgotten 4	Done late 3	Done when chased 2	On time, every time 1	1+ hr 4	30–60 min 3	10–30 min 2	Under 10 min 1	Nothing 5	In someone's head 4	Written down, not followed 3	Written & followed 2	Automated & systematized 1	
1	**Morning Huddle** Same format daily, led by you: yesterday's collections, open chair time, unconfirmed patients, calls to return. **Dropped:** skipped, or the owner leaves without the numbers.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
2	**Missed & Unreturned Calls** **Dropped:** a missed call never returned.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
3	**Speed to Respond to Inquiries** Target: under 5 minutes. **Dropped:** an inquiry left waiting.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
4	**Insurance Verification Before the Visit** **Dropped:** a patient seen with coverage unverified.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
5	**Claims & Insurance Follow-Up** **Dropped:** a claim sits past 30 days untouched.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
6	**Confirmations, No-Shows & Late Cancels** **Dropped:** an unconfirmed patient no-shows, or a gap stays empty.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
7	**Double Entry & Manual Handoffs** **Dropped:** details never make it into the second system.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
8	**Coverage When Someone's Out** **Dropped:** phones or billing stall when one person is out.	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
	ADD EACH COLUMN DOWN →	DONE TOTAL _____ (target 8–10)				TIME TOTAL _____ (target 8–12)				PROCESS TOTAL _____ (target 8–12)					_____

HOW TO READ IT

Does it actually get done? Use the "Dropped" line under each row. Often forgotten = 4 (darkest). Done on time, every time = 1 (white).

Does it run without you? If it lives in someone's head, it stops the day they're out. Nothing in place = 5. Automated and systematized, so it happens without anyone remembering = 1.

Row total (max 13) — a high score means it gets dropped, eats time, and depends on someone remembering. Fix those first: they cost the most time and the most patients.

TOTAL EFFICIENCY SCORE

Add every row total down the page: _____ / 104 (target 24–34)

Front-office time on these per day (add your estimates): _____ hrs

YOUR TOP 3 BOTTLENECKS — BY ROW TOTAL

1. _____ (____)
2. _____ (____)
3. _____ (____)

Share this with your practice owner. Your top 3 are the best place to start — and the first thing we'd look at together on a Revenue Waterline Audit call with them.

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