



Journeying Together - CA Zones Impact & Efficiencies

TLC's Team Driven Practice Seminar

April 2026



TLC's Capacity Busters- Audit

H & H- Hands and Hours

E & E- Efficiency and Effectiveness

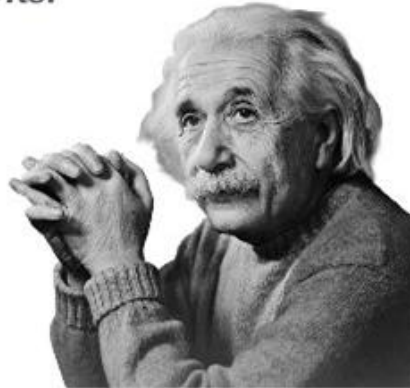
T & T- Tools and Technology



Challenges to Solve

*“If I had an hour to solve a problem
I'd spend 55 minutes thinking about the problem
and 5 minutes thinking about solutions.”*

~ Alfred Einstein



We cannot solve our
problems with the same
thinking we used when
we created them.

Albert Einstein



Challenges

Front Desk Challenges

1. Seeing where everyone is @ all times
2. Drs & CAs bypassing the front desk director

Tech Challenges

1. Patients waiting 10+ minutes for adjustments
2. Home recommendations follow up

Financial Challenges

1. Being busy & not helping the team connect
2. Allocating admin savings and knowing OH/OV versus OV fee

Doctor Challenges

1. Wanting more NPs- but not spending TEM - No GOOBing
2. Wanting retention & not doing SWS, TIC, REX



H & H

Calculate # of hours in prime time daily

Calculate # of adjustments Dr can see in an hour- on average not best ever- not being behind

Evaluate # of CAs - who is taking notes, who can do REX and how many minutes Dr needs to be part of REX

E & E

Amount of time to process an insurance claim

Amount of monies on avg from insurance companies

What is DVA collections from self pay- considering admin savings

What is admin savings

T & T

How many minutes per adjustment does it take to enter a patient note

What is amount of time CA does a rex

How many patients per hour do you set up patients in exercises or additional services



Financial CA

- Loves details #s
- Dives deep & grateful to be in primetime with people
- Speaks VALUE & BENEFITS

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	
8:00-8:15	<ul style="list-style-type: none"> • PREST • CHECK DECLINES • REVIEW EOD REPORTS • PULL ROFS FOR NEXT DAY 	<p>Always</p> <ul style="list-style-type: none"> • Check codes upon checking out patients 	<ul style="list-style-type: none"> • PREST • CHECK DECLINES • REVIEW EOD REPORTS • PULL ROFS FOR NEXT DAY 	<ul style="list-style-type: none"> • PREST • CHECK DECLINES • REVIEW EOD REPORTS • PULL ROFS FOR NEXT DAY 	
8:15-8:30	HUDDLE		<ul style="list-style-type: none"> • Backup TCA w/ Re-exams & NP 	HUDDLE	HUDDLE
8:30-10:00	<ul style="list-style-type: none"> • TURN ON RINGER • CLAIMS NEED ATTENT. • COMMUNICATION LOG • INS CALLS FOR NP 		<ul style="list-style-type: none"> • Backup FDCA w/ alerts & phone calls 	<ul style="list-style-type: none"> • TURN ON RINGER • FINANCIAL PLANS • INS CALLS FOR NP 	<ul style="list-style-type: none"> • TURN ON RINGER • FINANCIAL REPORTS • INS CALLS FOR NP
10:00-11:30	NPR/AR CHECKOUTS		NPR/AR CHECKOUTS	NPR/AR CHECKOUTS	
11:30-12:20	<ul style="list-style-type: none"> • FINANCIAL PLANS • TURN OFF RINGER 	CA HEART CALL - NOON	<ul style="list-style-type: none"> • FINANCIAL INQUIRIES • TURN OFF RINGER 	<ul style="list-style-type: none"> • FINANCIAL PLANS • TURN OFF RINGER 	
12:20-1:30	TEAM TRAINING/LUNCH	TDP - 3RD WEEK OF MONTH	LUNCH	LUNCH	
1:30-1:45	<ul style="list-style-type: none"> • PREST • CHECK MAIL 	<ul style="list-style-type: none"> • PREST • CHECK DECLINES • REVIEW EOD REPORTS • PULL ROFS FOR NEXT DAY 	<ul style="list-style-type: none"> • PREST • O3 	<ul style="list-style-type: none"> • PREST • CHECK MAIL 	
1:45-2:00	HUDDLE	HUDDLE	HUDDLE	HUDDLE	
2:00-3:00	<ul style="list-style-type: none"> • TURN ON RINGER • PROCESS FILES • INS CALLS FOR NP 	<ul style="list-style-type: none"> • TURN ON RINGER • FINANCIAL INQUIRIES • FINANCIAL PLANS • INS CALLS FOR NP 	<ul style="list-style-type: none"> • TURN ON RINGER • INS AUTH & NOTES REQUESTED • INS CALLS FOR NP 	<ul style="list-style-type: none"> • TURN ON RINGER • ENTER PAYMENTS • SCAN EOBs • INS CALLS FOR NP 	
3:00-4:00	NPR/AR CHECKOUTS	NPR/AR CHECKOUTS	NPR/AR CHECKOUTS	NPR/AR CHECKOUTS	
4:00-6:00	<ul style="list-style-type: none"> • RE-EXAM FINANCIAL CHECKS • INS CALLS FOR NP 	<ul style="list-style-type: none"> • RE-EXAM FINANCIAL CHECKS • INS CALLS FOR NP 	<ul style="list-style-type: none"> • RE-EXAM FINANCIAL CHECKS • INS CALLS FOR NP 	<ul style="list-style-type: none"> • RE-EXAM FINANCIAL CHECKS • INS CALLS FOR NP 	
6:00-6:15	• TURN OFF RINGER	• TURN OFF RINGER	• TURN OFF RINGER	• TURN OFF RINGER	
6:15-6:45		SWS - EVERY 4TH WEEK			

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
MONTHLY STATS												
PULL INACTIVE FILES												



Financial- Efficiency and Effectiveness

- Case average to go up 10% if you want your pay raises
- How many more patients at current dva
- Cash vs third party
- Additional services
- Cost versus benefits
- Raising dva





Tech CA

- Hands on person
- Good at bringing people back to the problem
- Focuses in the midst of chaos
- Present time conscious

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
8:00-8:15	<ul style="list-style-type: none"> ● PREST/ Re-Exam Prep. ● Turn on TV/Tablets ● Beat Sheet Update ● Turn on X-ray/Lights ● Empty Dehumidifier 	<p>Always</p> <ul style="list-style-type: none"> ● Work on Re-exams that NEED done for that week ● Help set up for SWS 	<ul style="list-style-type: none"> ● PREST/ Re-Exam Prep. ● Turn on TV/Tablets ● Beat Sheet Update ● Turn on X-ray/Lights 	<ul style="list-style-type: none"> ● PREST/ Re-Exam Prep. ● Turn on TV/Tablets ● Beat Sheet Update ● Turn on X-ray/Lights
8:15-8:30	HUDDLE & Turn on Music		HUDDLE & Turn on Music	HUDDLE & Turn on Music
8:30-10:00	<ul style="list-style-type: none"> ● Re-Exams & Traffic Cop ● NP Exams ● Dr. Assist & Clean Tables 		<ul style="list-style-type: none"> ● Re-Exams & Traffic Cop ● NP Exams ● Dr. Assist & Clean Tables 	<ul style="list-style-type: none"> ● Re-Exams & Traffic Cop ● NP Exams ● Dr. Assist & Clean Tables
10:00-11:30	<ul style="list-style-type: none"> ● Re-Exam and NP notes ● AR Support 		<ul style="list-style-type: none"> ● Re-Exam and NP notes ● AR Support 	<ul style="list-style-type: none"> ● Re-Exam and NP notes ● AR Support
11:30-12:20	<ul style="list-style-type: none"> ● Re-Exams & Traffic Cop ● Dr. Assist & Clean Tables 	CA HEART CALL 12-12:30 (2x)	<ul style="list-style-type: none"> ● Re-Exams & Traffic Cop ● Dr. Assist & Clean Tables 	<ul style="list-style-type: none"> ● Re-Exams & Traffic Cop ● Dr. Assist & Clean Tables
12:20-1:30	T.T. & Calender Update/LUNCH	TDP - 3RD TUESDAY @1	03 w Dr. / LUNCH	LUNCH
1:30-1:45	<ul style="list-style-type: none"> ● PREST/ Re-Exam Prep. ● Turn on Tablets & Music ● Huddle Prep. ● Turn on Lights 	<ul style="list-style-type: none"> ● PREST/ Re-Exam Prep. ● Beat Sheet Update ● Turn on Tablets & Music ● Turn on Lights 	<ul style="list-style-type: none"> ● PREST/ Re-Exam Prep. ● Turn on Tablets & Music ● Empty Dehumid./Water Plants 	<ul style="list-style-type: none"> ● PREST/ Re-Exam Prep. ● Turn on Tablets & Music ● Huddle Prep. ● Turn on Lights
1:45-2:00	HUDDLE	HUDDLE	HUDDLE	HUDDLE
2:00-3:00	<ul style="list-style-type: none"> ● Re-Exams & Traffic Cop ● NP Exams ● Dr. Assist & Clean Tables 	<ul style="list-style-type: none"> ● Re-Exams & Traffic Cop ● NP Exams ● Dr. Assist & Clean Tables 	<ul style="list-style-type: none"> ● Re-Exams & Traffic Cop ● NP Exams ● Dr. Assist & Clean Tables 	<ul style="list-style-type: none"> ● Re-Exams & Traffic Cop ● NP Exams ● Dr. Assist & Clean Tables
3:00-4:00	<ul style="list-style-type: none"> ● Re-Exam and NP notes ● X-rays Entered 	<ul style="list-style-type: none"> ● Re-Exam and NP notes ● AR Support 	<ul style="list-style-type: none"> ● Re-Exam and NP notes ● X-rays Entered 	<ul style="list-style-type: none"> ● Re-Fill/Restock Office ● X-rays Entered
4:00-6:00	<ul style="list-style-type: none"> ● Re-Exams & Traffic Cop ● Dr. Assist & Clean Tables ● NP Exams 	<ul style="list-style-type: none"> ● Re-Exams & Traffic Cop ● Dr. Assist & Clean Tables ● NP Exams 	<ul style="list-style-type: none"> ● Re-Exams & Traffic Cop ● Dr. Assist & Clean Tables ● NP Exams 	<ul style="list-style-type: none"> ● Re-Exams & Traffic Cop ● Dr. Assist & Clean Tables ● NP Exams
6:00-6:15	<ul style="list-style-type: none"> ● Beat Sheet Update ● Turn off X-ray & Lights ● Turn off Music & WINS! 	<ul style="list-style-type: none"> ● Beat Sheet Update ● Turn off X-ray & Lights ● Turn off Music & WINS! 	<ul style="list-style-type: none"> ● Beat Sheet Update ● Turn off X-ray & Lights ● Turn off Music & WINS! 	<ul style="list-style-type: none"> ● Beat Sheet Update ● Turn off X-ray/TVs/Lights ● Turn off Music & WINS!
6:15-6:45		SWS - EVERY 1st TUESDAY		



Tech- Tools and Tech

- Entering all notes real time
- Reviewing exercises using technology
- Think outside box
- Outcome assessments progress evaluation
- Finish the hour on time



Front Desk CA

- Directs everyone
- Keeps the flow moving
- Is the authority on schedule
- Builds connections deeply without being overly social

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY
8:00-8:15	<ul style="list-style-type: none"> • PREST • ALERTS • MESSAGES 	ALWAYS: - WRITE STARTING #s - BACK UP BRAELYNN - MARK WALK-INS - KEEP PTS ON PRESCRIBED SCHEDULE - PRINT X-RAY REPORTS	<ul style="list-style-type: none"> • PREST • ALERTS • MESSAGES 	<ul style="list-style-type: none"> • PREST • ALERTS • MESSAGES
8:15-8:30	<u>HUDDLE</u>		<u>HUDDLE</u>	<u>HUDDLE</u>
8:30-10:00	<ul style="list-style-type: none"> • CHECK-INS • CALLS • BACK-UP BRAELYNN • MAKE RE-EXAM LIST 		<ul style="list-style-type: none"> • CHECK-INS • CALLS • BACK-UP BRAELYNN • MAKE RE-EXAM LIST 	<ul style="list-style-type: none"> • CHECK-INS • CALLS • BACK-UP BRAELYNN • MAKE RE-EXAM LIST
10:00-11:30	<ul style="list-style-type: none"> • NEXT-DAY RE-EXAMS • NP FOLDERS • FILE 	ACCT MEETING W/ DR. NATE @ 1:00 (OR 12:30)	<ul style="list-style-type: none"> • NEXT-DAY RE-EXAMS • NP FOLDERS • FILE 	<ul style="list-style-type: none"> • NEXT-DAY RE-EXAMS • NP FOLDERS • CALL MON SPECIALTY
11:30-12:20	<ul style="list-style-type: none"> • PM PREST • CHECK-INS • F.U. ON EOD FLAGGING 	CA HEART CALL 12-12:30 (2x)	<ul style="list-style-type: none"> • PM PREST • CHECK-INS 	<ul style="list-style-type: none"> • PM PREST • CHECK-INS • F.U. ON EOD FLAGGING
12:20-1:30	TEAM TRAINING/LUNCH	TDP - 3RD TUESDAY @ 1:00	LUNCH	LUNCH
1:30-1:45	<ul style="list-style-type: none"> • PREST • ALERTS • MESSAGES 	<ul style="list-style-type: none"> • PREST • ALERTS • MESSAGES 	<ul style="list-style-type: none"> • PREST • ALERTS • MESSAGES 	<ul style="list-style-type: none"> • PREST • ALERTS • MESSAGES
1:45-2:00	<u>HUDDLE</u>	<u>HUDDLE</u>	<u>HUDDLE</u>	<u>HUDDLE</u>
2:00-3:00	<ul style="list-style-type: none"> • TURN ON RINGER 	<ul style="list-style-type: none"> • TURN ON RINGER 	<ul style="list-style-type: none"> • TURN ON RINGER 	<ul style="list-style-type: none"> • TURN ON RINGER
3:00-4:00	<ul style="list-style-type: none"> • SCHEDULE ARs • NEXT-DAY RE-EXAMS • CALL SPECIALTY 	<ul style="list-style-type: none"> • SCHEDULE ARs • NEXT-DAY RE-EXAMS • CALL SPECIALTY 	<ul style="list-style-type: none"> • SCHEDULE ARs • NEXT-DAY RE-EXAMS • CALL SPECIALTY 	<ul style="list-style-type: none"> • SCHEDULE ARs • NEXT-DAY RE-EXAMS • CALL SPECIALTY
4:00-6:00	<ul style="list-style-type: none"> • WELCOME BOARD • PRINT SCHEDULE 	<ul style="list-style-type: none"> • WELCOME BOARD • PRINT SCHEDULE 	<ul style="list-style-type: none"> • WELCOME BOARD • PRINT SCHEDULE 	<ul style="list-style-type: none"> • WELCOME BOARD • PRINT SCHEDULE
6:00-6:15	<ul style="list-style-type: none"> • TURN OFF RINGER • EOD REPORTS • WINS! 	<ul style="list-style-type: none"> • TURN OFF RINGER • EOD REPORTS • WINS! 	<ul style="list-style-type: none"> • TURN OFF RINGER • EOD REPORTS • WINS! 	<ul style="list-style-type: none"> • TURN OFF RINGER • EOD REPORTS • WINS!
6:15-6:45		SWS - EVERY 2ND TUESDAY		



Front Desk- H&H

- Schedule before start of week
- Objective 90 percent kept
- Cluster scheduled at 20 per hour
- With two Rex
- And a no
- 1 dr
- 1 tech and floater financial ca



Drs Zone

- **Cost of training new CAs versus paying them and retaining them**
- **Avg years you have taken to make the changes your ac coaches have asked you**
- **Excitement to grow PVA by 5**
- **Incentivize good behaviors**



Schedule / Class Resources / Event Sign Up / General TLC Resources





The Beginning



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12:20-1:30	TEAM TRAINING/LUNCH	TDP - 3RD TUESDAY @ 1:00	LUNCH	LUNCH
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1:45-2:00	<u>HUDDLE</u>	<u>HUDDLE</u>	<u>HUDDLE</u>	<u>HUDDLE</u>
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6:00-6:15	<ul style="list-style-type: none"> • TURN OFF RINGER • EOD REPORTS 	<ul style="list-style-type: none"> • TURN OFF RINGER • EOD REPORTS 	<ul style="list-style-type: none"> • TURN OFF RINGER • EOD REPORTS 	<ul style="list-style-type: none"> • TURN OFF RINGER • EOD REPORTS

	• WINS!	• WINS!	• WINS!	• WINS!
6:15-6:45		SWS - EVERY 2ND TUESDAY		

