

15-MINUTE PRACTICE SCORECARD

DENTAL FRONT DESK LOAD AUDIT.

Count the repeated admin, draw the approval boundary, and find the one workflow worth testing—without sharing patient information.

01

COUNT THE WORKLOAD

02

SET GREEN/AMBER/RED

03

CHOOSE ONE PILOT

Do not include patient information. Use counts, time bands, task descriptions, system names and exception types only. No names, records, screenshots, credentials or clinical details.

WHAT KEEPS RETURNING TO THE QUEUE?

Estimate a normal week. Accuracy to the nearest hour is enough; the goal is to identify concentration, not conduct a time-and-motion study.

PRACTICE

COMPLETED BY / ROLE

TYPICAL CHAIRS OPERATING

FRONT-DESK TEAM SIZE

Repeated admin task	Times / week	Minutes each	Weekly hours	Backlog?
Appointment enquiries Inbox, website form, SMS, missed-call follow-up				Y / N
Recall preparation List check, draft, response queue				Y / N
Confirmation / reschedule administration				Y / N
Intake completeness checks Administrative fields only				Y / N
Routine FAQ responses Approved practice information only				Y / N
Daily handoff / exception summary				Y / N
Other:				Y / N

Quick calculation: times per week × minutes ÷ 60 = weekly hours

DELEGATE, APPROVE, OR KEEP HUMAN.

Classify the task before discussing tools. If the boundary is unclear, move it one column to the right.

GREEN	AMBER	RED
DELEGATE Repeatable administrative preparation inside approved policy. • Classify routine enquiries • Check form completeness • Prepare approved templates • Maintain a work queue	APPROVE Maya prepares; an authorised team member releases or decides. • Patient communications • Appointment commitments • Fees or payment information • Complaints and distress	HUMAN ONLY Outside the worker's authority by design. • Clinical advice • Treatment urgency • Medication questions • Record interpretation

Where must the worker stop? List words, request types, systems or situations that always escalate:	Who owns approval? Name the role—not the person—responsible for releases and exceptions:
What information is approved? List existing public/practice-approved FAQs, scripts and policies:	What access is unnecessary? Start by naming systems and fields the pilot must not receive:

ONE WORKFLOW. ONE SCOREBOARD.

Choose the smallest repeated task that has visible volume, a clear owner, safe boundaries and a measurable current state.

CURRENT WEEKLY HANDLING HOURS

TYPICAL RESPONSE / CYCLE TIME

ITEMS WAITING AT END OF DAY

CURRENT ERROR / REWORK SIGNAL

CANDIDATE WORKFLOW

START

What event puts work into the queue?

DONE

What observable state means the task is complete?

OWNER

Which role approves and receives exceptions?

VOLUME

How many times does this happen weekly?

BOUNDARY

What always stays human?

MEASURE

Which metric decides whether to continue?

PILOT READINESS

The task repeats at least weekly	YES / NO	The current owner is known	YES / NO
"Done" is observable	YES / NO	Clinical/billing boundaries are explicit	YES / NO
Synthetic test cases can be created	YES / NO	A baseline metric exists	YES / NO

TURN THIS INTO A 90-DAY PILOT MAP.

Book a 30-minute Dental Front Desk Load Audit. Bring this scorecard; leave patient records at the practice.

BOOK AUDIT ↗