ClinicOps

FREE DOWNLOAD

# The Owner's Operating Rhythm

**Five meetings that keep a medical or dental practice running without the owner in the middle. The rhythm on one page, a weekly review, a month-end page and your own score.**

**Problems should reach the owner on a schedule, not by interruption. Write your slot and owner on each rung below. Page 2 runs the weekly review, page 3 the month-end, page 4 scores your week.**

**90%**
of medical groups had higher operating costs in 2025
MGMA Stat, Jun 2025

**4 in 5**
medical groups had an admin job open in Nov 2026
MGMA Stat poll, Nov 3, 2026

**38%**
of dentists were not busy enough in Q3 2026
ADA HPI, Q3 2026

## The rhythm

| Cadence | The one question | What it checks | Your slot | Owner |
|---|---|---|---|---|
| **Daily** 10 min, before clinic | What could go wrong today? | Open slots; who is out and who covers the phones at peak; anything left open at yesterday's close. | | |
| **Weekly** 30 min, owner and manager | What needs the owner, and what do the numbers say? | Six to eight numbers against targets; decisions above the manager's limit; open roles; tasks due in 30 days. | | |
| **Monthly** 60 min, after month-end | Are we on budget, and does cash cover 13 weeks? | Budget against actual; cash forecast; bank, refunds and adjustments reviewed by someone who did not post them. | | |
| **Quarterly** 60 min, owner and manager | Which system is failing, and which do we fix next? | The numbers as a trend; one fix with an owner and a date; the system access list; a test call at a busy hour. | | |
| **Annual** Half a day, owners | What will we change, and what must not lapse? | A one-page plan; decision limits reset; the budget; every federal and state date (page 5). | | |

## Start this week

1. Count every operational question you answer for three clinic days. Put the average on page 4.
2. Book the weekly review: 30 minutes, same slot, for 12 weeks. Fill page 2 at the first one.
3. Write five decisions with a decider and a dollar limit (hires, slots, purchases, complaints, refunds).
4. Put the page 5 dates on the shared calendar with an owner each, then fill the slot and owner columns above.

This file holds no patient information and needs none. Keep chart numbers and patient details off every page.

# The weekly owner and manager review

Thirty minutes, same slot every week. The manager prepares the numbers and the decision list; if the owner is in clinic, the manager still holds the slot and sends this page. Anything carried over two weeks in a row becomes next week's first item.

| Week of | Held on | Owner | Manager |
|---|---|---|---|
| | | | |

## 1. The weekly numbers (minutes 0 to 5): what changed, and why?

| Measure (medical / dental) | Definition | Target | This week | Last week | Note |
|---|---|---|---|---|---|
| Visits vs slots / chair hours scheduled | | | | | |
| No-show rate, by visit type | | | | | |
| New patients / new-patient calls booked | | | | | |
| Calls answered (phone system report) | | | | | |
| Recall list worked / hygiene reappointment | | | | | |
| Open roles and days open | | | | | |
| Overdue compliance tasks (target: zero) | | | | | |
| Cash vs the 13-week forecast | | | | | |

## 2. Decisions above the manager's limit (minutes 5 to 15)

| Decision needed | Why it is above the limit | Decided | Next step owner | By when |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |

## 3. People and coverage (minutes 15 to 22)

| Gap: absence, open role, a new hire's first solo day | Dates | Who covers |
|---|---|---|
| | | |
| | | |

## 4. Compliance and renewals due in 30 days (minutes 22 to 27)

| Task or renewal | Due | Owner | Done |
|---|---|---|---|
| | | | |
| | | | |

## 5. Commitments read back (minutes 27 to 30)

| Who | Will do what | By when |
|---|---|---|
| | | |
| | | |

# The month-end page

**Sixty minutes after the books close: are we on budget, and does cash cover the next 13 weeks? The checks below are the practice's main fraud control, so the page is signed.**

| Month | Close finished on | Prepared by | Reviewed by |
|---|---|---|---|
| | | | |

## Budget against actual

| Line | Budget | Actual | Variance | Why, in one line |
|---|---|---|---|---|
| Revenue collected | | | | |
| Staff pay and benefits | | | | |
| Supplies | | | | |
| Rent and occupancy | | | | |
| Everything else | | | | |
| Net before owner pay | | | | |

| Ratio or cash line | Reference point | Yours |
|---|---|---|
| Staff pay and benefits, share of revenue | MGMA 2025: roughly a quarter of revenue (support staff) | |
| Dental: expenses before owner pay, share of gross | HPI 2025 averages: about 57.6% (ClinicOps calculation) | |
| Lowest week in the 13-week cash forecast | Your floor, for example one month of payroll | |

## The controls, ticked and signed

- [ ] **Bank statement reconciled and reviewed by someone who does not post payments.**
  ACFE 2026: under 100 employees, the median fraud loss was $126,000; frauds ran a median 12 months.
- [ ] **Patient refunds reviewed line by line against the written refund policy.**
- [ ] **Every adjustment above the written limit reviewed one by one, never by the person who posted it.**
- [ ] **Exclusion check run for every employee and contractor on the OIG list.**
  Hiring an excluded person can bring civil monetary penalties (HHS OIG).
- [ ] **Google profile checked; every new review answered with no patient details and no incentive.**
- [ ] **Quarter months: system access list compared with the staff list.**
  HIPAA: regular review of system activity, 45 CFR 164.308(a)(1)(ii)(D).

| Came to the owner this month (count) | One decision to hand to the manager next month | Signed (owner) |
|---|---|---|
| | | |

# Your score: how much of the week the practice takes

This score turns your own counts into owner hours a year, and those hours into money. The worked example is a composite 3-physician family practice, shown to make the math clear; it is not a real practice.

### The owner in the middle score

| | Line | How to work it out | Worked example | Yours |
|---|---|---|---|---|
| A | Operational questions you answer per clinic day | Average of a three-day count | 15 | |
| B | Average minutes each | Your estimate | 4 | |
| C | Clinic days a year | From your schedule | 240 | |
| D | Hours a year in the middle | A x B x C, divided by 60 | 240 | |
| E | Hours a year on the rhythm | 84 in the example; use yours | 84 | |
| F | Questions per day, four weeks after starting | Recount for three days | 4 | |
| G | Hours a year still in the middle | F x B x C, divided by 60 | 64 | |
| H | Owner hours back a year | D minus (E plus G) | 92 | |
| I | What those hours are worth | H x your clinical revenue per hour | $23,000 at $250 | |

Reading it: if D is above 150, the practice runs through you; start with the five decisions on page 1. If H is below zero after four weeks, the huddle is running long or questions still bypass the weekly list.

# When the rhythm goes wrong

| If | Then |
|---|---|
| The huddle runs 30 minutes | It became problem-solving. Stand at the board, stop at 10 minutes, move the rest to the weekly list. |
| The weekly review keeps being cancelled | Make it a recurring slot. If the owner is in clinic, the manager still holds it and sends page 2. |
| Everything still comes to the owner | The limits are not written. Write the five decisions on page 1 with dollar limits and post them. |
| The manager who ran it has left | Run page 2 yourself until a backup is trained. MGMA put front office turnover at 40% in 2022. |
| A second owner wants a veto | List what needs both owners (new positions, new services, contracts over a year); the rest stays with the manager. |
| Dental: gaps in the schedule, phones seem fine | Count new-patient calls booked by person for two weeks. Liine (2024) found staff conversion from 25.5% to 74.1%. |

Score the 10-point rhythm check (decision rights, huddle, weekly review, numbers, close, controls, quarterly, plan, dates, owner away) on the guide page.

## The federal dates to carry (add your state's)

| Task | How often | Rule |
|---|---|---|
| Bloodborne pathogens training; exposure plan review | Yearly (training also at hire) | 29 CFR 1910.1030(c), (g) |
| Breaches under 500 people, to HHS | By Mar 1, 2027 for 2026 | 45 CFR 164.408(c) |
| HIPAA risk analysis; records kept | Review yearly; keep 6 years | 45 CFR 164.308; 164.316 |
| Privacy training, each new hire | Reasonable period after joining | 45 CFR 164.530(b)(2) |
| DEA registration, each prescriber | Every 36 months | 21 CFR 1301.13(d) |

**Benchmarks for page 2: how to run a medical practice. Phones and recall: front desk operations.**

## Sources

Checked against the original source in November 2026. Rules and figures change: confirm anything time-sensitive on the source page.

1. MGMA Stat: operating costs still rising (poll of Jun 10, 2025) (Jun 11, 2025). mgma.com/mgma-stat/medical-practice-operating-costs-are-still-rising-in-2025-h

2. MGMA Stat: open admin jobs (poll of Nov 3, 2026) (Nov 4, 2026). mgma.com/mgma-stat/4-in-5-medical-groups-report-open-admin-jobs

3. MGMA: front office turnover 40% in 2022; MGMA Stat no-show rates 2019 to 2023 (2023, 2025). mgma.com/data-report-practice-operations-2023

4. ADA HPI: State of the U.S. Dental Economy Q3 2026; Survey of Dental Practice 2025, Tables 5 and 13 (2026). ada.org/-/media/project/ada-organization/ada/ada-org/files/resources/research/

5. ACFE, Occupational Fraud 2026: A Report to the Nations; Liine Dentistry Benchmark Report 2024 (vendor) (2026, 2024). acfe.com/-/media/files/acfe/pdfs/rttn/2026/2026-report-to-the-nations.pdf

6. HHS OIG exclusions (LEIE) and civil monetary penalties (current). oig.hhs.gov/exclusions/

7. 29 CFR 1910.1030 and 1904 App. A; 45 CFR 164.308, .316, .408, .530; 21 CFR 1301.13 (law.cornell.edu) (current text). law.cornell.edu/cfr/text/45/164.408

## Where this rhythm stops

**These pages set the rhythm. They cannot run it for you, every week, when the office is busy:**

- **It cannot hold the meeting. The rhythm stops the first week nobody opens page 2.**
- **It cannot pull your numbers or see your schedule; someone has to bring them every week.**
- **It cannot cover the manager's chair when they leave or take a vacation.**

**Fractional Operating Partner: we run and keep improving the whole operation every month, so it never slides back.**

**Book the free 20-minute Chaos Audit >**

It is a diagnostic call, not a sales call: we walk back the last thing that slipped, put an hours or dollar figure on it, and you leave with the first fix whether or not you hire us.

Not ready to talk? Score your practice in 3 minutes, or get more free tools and templates.
Follow ClinicOps for one useful fix a week: LinkedIn | YouTube | X | Instagram | Facebook