

The 20-Point Practice Operations Stress Test

A practical team worksheet for finding the operational gaps that create pressure.

Practice: _____ Review date: _____

Review the last 30 business days. Score each statement based on what actually happened, not what the policy says should happen. Each section has four items and a possible 12 points; the full assessment has a possible 60 points.

- 0** No consistent process is in place.
- 1** A process exists, but it varies or depends on one person's memory.
- 2** An owner and backup are clear, and the process is usually followed.
- 3** The process is tracked, reviewed, and adjusted when results fall short.

1. Workflow ownership and continuity

STATEMENT	SCORE 0-3
1 Recurring operational workflows have a clearly named owner.	_____
2 A trained backup can carry essential workflows when the primary owner is out.	_____
3 Team members can find the current process and required documentation without relying on memory.	_____
4 When a task cannot be completed, the next owner and follow-up date are recorded.	_____

Section score: _____ / 12

Keep the evidence visible.

Use a named owner, tracker, handoff note, or follow-up date as evidence. Score the process without turning the review into a blame exercise.

2. Patient journey and handoffs

STATEMENT	SCORE 0-3
5 New patient inquiries have a defined response and follow-up process.	_____
6 The team knows who confirms forms, records, and readiness before the visit.	_____
7 Clinical recommendations have a clear handoff to the person who discusses next steps with the patient.	_____
8 After the visit, unscheduled treatment or patient questions have an owner and a follow-up date.	_____

Section score: _____ / 12

3. Schedule and capacity management

STATEMENT	SCORE 0-3
9 Provider and hygiene schedules are reviewed for usable capacity, not just filled time.	_____
10 Openings and cancellations have a defined same-day response and recovery process.	_____
11 The team records recurring reasons for lost or unused appointment time.	_____
12 When provider time is disrupted, the team has a clear decision path for affected patients and remaining capacity.	_____

Section score: _____ / 12

Build consistent follow-through.

Continue scoring based on the last 30 business days. Add the four item scores for each section, then bring all five section scores to the summary page.

4. Financial follow-through

STATEMENT	SCORE 0-3
13 Accounts receivable work ends with a documented next action, owner, and follow-up date.	_____
14 Claims needing correction, documentation, or escalation are tracked to resolution.	_____
15 Diagnosed but unscheduled treatment is reviewed through a consistent follow-up process.	_____
16 Adjustments, write-offs, and collection gaps are reviewed for repeatable causes and assigned actions.	_____

Section score: _____ / 12

5. Team execution and learning

STATEMENT	SCORE 0-3
17 High-frequency tasks have a clear standard that team members can follow consistently.	_____
18 Training includes observation or practice to confirm the workflow can be performed correctly.	_____
19 Team meetings identify priorities, owners, and unresolved operational risks.	_____
20 When a measure or process misses its intended result, the team makes and reviews a specific change.	_____

Section score: _____ / 12

Review. Align. Improve.

Add your five section scores, then choose one improvement to test over the next 30 days.

Workflow ownership and continuity	_____ / 12
Patient journey and handoffs	_____ / 12
Schedule and capacity management	_____ / 12
Financial follow-through	_____ / 12
Team execution and learning	_____ / 12

OVERALL SCORE: _____ / 60

How to read your total

0-19 | Establish the basics

Start with one recurring workflow and make the next action visible.

20-34 | Reduce inconsistency

Clarify ownership and backups in the areas where the process varies.

35-49 | Strengthen management

Keep the working systems and close the remaining handoff gaps.

50-60 | Protect reliability

Test continuity during absences and keep reviewing exceptions.

These ranges are guideposts created for this self-assessment. They are not industry benchmarks or validated performance thresholds. The score is an internal baseline, not a compliance determination or a judgment of an individual. Compare your practice with its own next review.

Your 30-day improvement plan

Lowest-scoring section: _____

One change to test: _____

Owner: _____

Evidence that will show progress: _____

Review date: _____

Look for clearer handoffs, fewer stranded tasks, and workflows that can continue when the usual person is unavailable. Choose one change that your team can maintain.

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