

Sequence of Optimization

Below is a Tentative optimization program, which will be clarified/finalized as we proceed:

■ **12-27-02: Initial Processing**

- ☐ *You* mail me your doctor and team member *Evaluation Envelopes* by 12-27-02 (FRI).
- ☐ *You* mail me a set of **ALL FORMS** used in your by 01-10-03 (FRI).
- ☐ *You* mail me an accurate **Layout of your Exam/Consult Room** by 01-17-03 (FRI).
- ☒ I will send you any layout changes for discussion by 02-07-03 (FRI).

■ **01-10-03: Scheduling System Statistics**

- ☐ *You* mail me your *Scheduling Statistics* by 01-10-03 (FRI).
- ☒ I use the scheduling statistics in the design of your schedule.

■ **01-12-03: Fee Schedule Design**

- ☐ *You* fax me your **present FEE Schedule** before 01-17-03 (FRI).
- ☒ I revise/reformat it and fax it back to you by 01-24-03 (FRI).
- ☒ After the *Scheduling Analysis* is completed, the Ph-I and Limited fees will be accurately calculated and the final Fee Schedule will be calculated and sent.
- ☒ At my visit, we finalize the FEE SCHEDULE and I will sent to you copies to work with.

■ **02-07-03: Dictated Exam Design**

- ☐ *You* and your **TC** complete the **Dictated Exam Design Kit** and mail it to me by 02-07-03 (FRI).
- ☒ I compose your Dictated Exam Form and mail you copies to work with by 02-14-03 (FRI).
- ☐ *You* and your **TC** work with the newly composed Dictated Exam Form, edit it and fax it back to me by 03-07-03 (FRI).
- ☒ I re-compose your Dictated Exam Form and mail copies to you to work with by 03-14-03 (FRI).
- ☐ *You* and your **TC** work with the re-composed Dictated Exam Form, finalize it, and fax it back to me for finalization by 04-18-03 (FRI).
- ☒ I finalize your Dictated Exam Form, send you copies by 04-25-03 (FRI).
- ☒ At my visit, we finalize the exam and have it printed and sent to you.

■ **02-28-03: TC Forms Design and TC Exam Program**

- ☐ *You* and your **TC** set aside a non-patient day to read the Patient-Centered Services manual, complete the **FORMS Design Kit**, and fax the changes to me by 02-21-03 (FRI).
- ☒ I **discuss the changes with you**, re-compose the forms and mail you copies to work with, with your new Patient-Centered Services Program by 03-07-03 (FRI).
- ☒ *You* and your **TC** try your best to implement the new, *copied* TC forms and procedures. I have found that it is best for the TC and doctor to try out the program on their own and later re-fine/finalize it at my 3-day visit. To learn your procedures you must set aside an entire non-patient day and do mock exams with your other teammates being the patients and parents. Once

you feel comfortable with the forms and procedures and your team you can do the procedures with real patients from then on.

- ☐ **You** and your **TC** use the *copied* forms for your new patient exams and consults, finalize any changes, and fax the final changes to me by 03-28-03 (FRI).
- ☒ **I** recompose the forms and fax you a copy of every form for your OK to print by 04-11-03 (FRI).
- ☐ **You** and your **TC** use the forms until my visit, but can make changes and fax them to me as desired.
- ☒ **I** will go over the exact use of each form at my 3-day visit to maximize their effectiveness.
- ☒ **We** finalize the forms at the visit and have them printed.

■ 03-14-03: Scheduling System Design

- ☐ **You** briefly look over the *Tx Mechanotherapy Analysis Kit*. We will set up a date to discuss your exact Tx Mechanotherapy (it will take a 2- to 3-hour phone call) probably the week ending March 14th preferably in the AM (or whatever date and time works for you that week).
- ☒ **I** document your Tx Mechanotherapy and fax it to you by 03-14-03 (FRI).
- ☐ **You** edit your documented Tx Mechanotherapy and fax it back to me by 03-21-03 (FRI).
- ☒ **I** delineate your *Scheduling Appointments* and mail you and all your team members a copy to work with (instructions will be enclosed) by 03-28-03 (FRI).
- ☐ **You and your team** set aside about 4 hours on a non-patient day to finalize your appointment times and fax them to me by 04-11-03 (FRI).
- ☒ **I call you** to finalize the details on your Scheduling Appointments and on your Scheduling Design Parameters (it will take a 1- to 2-hour phone call) probably the week ending April 18th preferably in the AM (or whatever date and time works for you that week).
- ☒ **I** design your Scheduling System, finalize your Fee Schedule, and mail you the Fee Schedule to you on 05-02-03 (FRI).
- ☐ You review the Scheduling System Design with your team and call me with any final details by 05-09-03 (FRI).
- ☒ Your schedule and other systems can now be installed at your 3-day visit.

The 3-day visit for installing your TC Systems and Scheduling System will probably be scheduled the week ending May 30th or June 6th if all goes well. The 3-day visit will be on the days of the week most convenient and the 3-day schedule is:

- ☺ 1st Day AM: Install Scheduling System (concepts and use) – all doctors and team members.
- ☺ 1st Day PM: Install TC Exam and Receptionist-related programs – all doctors and team members.
- ☺ 2nd Day AM: Install *TC Exam* program in detail with the doctors, your TC and team members (who do mock exams with us), as the receptionist installs the patients into the new scheduling book – all doctors and team members.
- ☺ 2nd Day PM: Continue installing TC program and scheduling system – all doctors and team members.
- ☺ 3rd Day AM: Install TC Consult program – minimally require the doctors, TC and receptionist, but it is best to have some other team members available, too.
- ☺ 3rd Day PM: Continue installing TC Consult program.