The Administrator's Toolbox:
Resources for the New Administrator
Step 1. Get Started with an Organizational Chart

The ABCs of Creating an Organizational Chart for Your Practice

A: Assess Your Personnel and Practice Patterns

The first step in creating your Organization Chart is to assess your personnel and practice patterns. Use the practice assessment tool below to determine the breakdown of departments within your practice. For larger practices, some of these services may either be outsourced or provided by in-house hired staff. It's also important to consider the particular practice pattern of your physicians as the subspecialties of ophthalmology often have very different practice patterns and staffing needs. It may be best to use this sheet for each subspecialty.

Note: This form provides several examples of staff positions and is to be used as a guide.

Breakdown of Clinical Staff	# of Staff	Notes: (Report to:)
1. Tech Supervisor		
2. Scribes		
3. Testing techs		
4. Work up techs		
5. Surgery scheduler		
6. Ophthalmic photographer		
7. Other		

Practice Pattern: (In this area, you can identify any particular practice pattern needs for your specialty.)

Breakdown of Optical Staff	# of Staff	Notes: (Report to:)
1. Optician		
2. Staff for ordering, budgets, 3. merchandizing		
4. Staff for lab processing/ordering		
5. Staff for check in and check out 6. (for larger optical shops)		
7. Other		

Practice Pattern: (In this area, you can identify any particular practice pattern needs for your specialty.)

Breakdown of Administrative Staff	# of Staff	Notes: (Report to:)
Business Office—Front Desk Staff		
1. **Check in/Check out Staff**		
2. Telephone Receptionist		
3. Appointment Scheduler		
4. Staff for insurance verification and authorizations		
5. Staff for medical records		
6. Other		
Business Office—Accounts Receivable		
1. Coding specialist (in-house or outsourced)		
2. Patient biller (in-house or outsourced)		
3. Claims resolution staff (in-house or outsourced)		
4. Other		
In-house or Outside Support		
1. Accounting		
2. Insurance		
3. Legal (attorney)		
4. Payroll company		
5. IT support		
6. Facilities		
7. Other		