

## Payroll and Staffing Efficiency Checklist

A staffing cost, schedule coverage, productivity, overtime, and role-accountability review tool for healthcare practices

### Purpose

Use this checklist to evaluate whether staffing levels, payroll cost, role structure, overtime, scheduling coverage, productivity, and accountability are aligned with practice volume and operational needs. It is designed for medical practices, dental practices, ASCs, and office-based surgical settings.

### How to Use This Resource

Complete the checklist before launching, renewing, expanding, or materially changing the process being reviewed.

Assign an internal owner for each open item and document deadlines, evidence, and follow-up requirements.

Scale review depth to risk, patient impact, financial exposure, regulatory exposure, and operational importance.

Retain the completed checklist with related documentation, decisions, corrective actions, and leadership approvals.

### 1. Staffing Structure and Role Clarity

<input type="checkbox"/>	Checklist item	Notes / owner
<input type="checkbox"/>	Maintain a current staffing roster by role, status, location, department, schedule, pay type, and supervisor.	
<input type="checkbox"/>	Confirm every role has a clear job description, essential duties, productivity expectations, and reporting structure.	
<input type="checkbox"/>	Identify duplicate roles, unclear ownership, task gaps, and work being performed by overqualified or underqualified staff.	
<input type="checkbox"/>	Review whether staffing structure supports clinical workflow, front desk operations, billing, compliance, and leadership needs.	

### 2. Payroll Cost and Labor Ratio Review

<input type="checkbox"/>	Checklist item	Notes / owner
<input type="checkbox"/>	Review payroll cost by department, location, provider, service line, and pay period.	
<input type="checkbox"/>	Compare payroll cost to production, collections, visits, cases, procedure volume, or other relevant output measures.	
<input type="checkbox"/>	Identify overtime, premium pay, agency staffing, excess hours, missed punches, and timekeeping irregularities.	
<input type="checkbox"/>	Review payroll trends over the prior three to twelve months to identify drift or recurring inefficiency.	

### 3. Schedule Coverage and Capacity Alignment

<input type="checkbox"/>	Checklist item	Notes / owner
<input type="checkbox"/>	Compare staffing schedules to patient volume, provider schedules, surgical case schedules, hygiene schedules, front desk demand, and billing workload.	
<input type="checkbox"/>	Identify understaffed and overstaffed time blocks, uneven coverage, bottlenecks, and preventable overtime.	
<input type="checkbox"/>	Review call-out patterns, PTO planning, lunch coverage, opening/closing coverage, and cross-coverage needs.	
<input type="checkbox"/>	Confirm staffing models support patient safety, service quality, productivity, and compliance requirements.	

### 4. Productivity and Performance Review

<input type="checkbox"/>	Checklist item	Notes / owner
<input type="checkbox"/>	Define role-specific productivity expectations for front desk, billing, clinical, hygiene, surgical, administrative, and management roles.	
<input type="checkbox"/>	Review output measures such as calls handled, claims worked, patients roomed, cases supported, collections completed, recalls scheduled, or tasks closed.	
<input type="checkbox"/>	Identify staff who need training, coaching, workflow support, clearer expectations, or performance correction.	
<input type="checkbox"/>	Review whether managers are using data and documentation to address performance issues consistently.	

### 5. Training, Cross-Training, and Competency

<input type="checkbox"/>	Checklist item	Notes / owner
<input type="checkbox"/>	Review onboarding, role-specific training, annual training, compliance training, and competency documentation.	
<input type="checkbox"/>	Identify single-person dependency risks, cross-training gaps, and coverage vulnerabilities.	
<input type="checkbox"/>	Confirm clinical and surgical staff are trained for scope of duties, equipment use, infection control, emergency response, and documentation requirements.	
<input type="checkbox"/>	Assign training priorities based on operational risk, patient impact, compliance exposure, and productivity gaps.	

## 6. Management Controls and Accountability

<input type="checkbox"/>	Checklist item	Notes / owner
<input type="checkbox"/>	Review approval controls for schedules, overtime, timecards, PTO, bonuses, commissions, and payroll changes.	
<input type="checkbox"/>	Confirm managers review labor reports and productivity data at a defined cadence.	
<input type="checkbox"/>	Document corrective actions for recurring staffing issues, payroll waste, absenteeism, role confusion, or low productivity.	
<input type="checkbox"/>	Align staffing decisions with budget, patient demand, provider utilization, growth goals, and compliance requirements.	

## 7. Staffing Efficiency Action Plan

Use this section to document payroll, staffing, productivity, and role-accountability corrections.

Priority	Gap / opportunity	Owner / target date
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High		
Medium		
Low		
Follow-up		

### Resource Page Intro Copy

Use this checklist to review payroll cost, staffing levels, role clarity, schedule coverage, productivity, overtime, training, and accountability across your practice or surgical facility.

### Website CTA Copy

Need help reducing payroll waste or building a staffing model that fits actual patient volume and workflow needs? Solstice Group can help evaluate labor structure, productivity, and team accountability.

### Disclaimer

This resource is provided for general business and compliance education only. It is not legal, medical, accounting, tax, financial, regulatory, or clinical advice. Organizations should consult qualified legal, compliance, privacy, financial, and professional advisors regarding their specific obligations and risk profile.