Your practice discovery guide

Interview your team area by area, map how the work happens today, rank the pain points, and build your plan. Bring it to your conversation with WebPT.

1 **Interview.** Sit down with the people who do the work, one area at a time.

2 **Map.** Write down how the work happens today, step by step.

3 **Rank.** Score each pain point by how often it happens and how much it costs.

4 **Plan.** Pick where to start, who owns it and what success looks like.

Before you start

- [ ] Book 30 minutes with each person on the interview list
- [ ] Pull the numbers listed for each area, or ask who can
- [ ] Pick one person to collect the notes
- [ ] Set a date to build your plan together

What's inside

Front desk
Questions, a workflow map, pain points, numbers

Clinical
Questions, a workflow map, pain points, numbers

Billing
Questions, a workflow map, pain points, numbers

Patients
Questions, a workflow map, pain points, numbers

Practice leadership
Questions, a workflow map, pain points, numbers

Build your plan
Top pain points, where to start, owners, success

Questions to ask WebPT
Bring these to your first conversation

Front desk

Who to interview: Your front desk lead and whoever answers the phones and the fax · Interviewed: _____ · Date: _____

Questions to ask

Walk me through what happens when a new referral arrives.

How long does a referral usually wait before someone reaches the patient?

How do you check insurance and authorizations, and how long does it take?

What happens when a patient cancels or doesn't show?

What do patients call about most often?

Which part of your day would you hand off first if you could?

How the work happens today

Step	Who	Tool or system	Time	Hand-off to

Pain points

Pain point	How often (1–5)	How much it costs (1–5)	Score

Numbers worth pulling

New referrals a week, and how many become a first visit	
No-show and late cancellation rate last month	
Time spent on verification in one day	

Clinical

Who to interview: Two or three clinicians, including your busiest · Interviewed: _____ · Date: _____

Questions to ask

When do you finish your notes, and how often after hours?

What do you look up before a visit, and where?

Which parts of the note take the longest?

How do you know a note is ready for billing?

How do home programs get to patients today?

What would give you the most time back each week?

How the work happens today

Step	Who	Tool or system	Time	Hand-off to

Pain points

Pain point	How often (1–5)	How much it costs (1–5)	Score

Numbers worth pulling

Notes still open at the end of each day	
Average minutes documenting per visit	
Notes returned for corrections last month	

Billing

Who to interview: Your biller or billing service · Interviewed: _____ · Date: _____

Questions to ask

Walk me through a claim from signed note to paid.

Where do claims get stuck or come back?

What are your top three denial reasons?

How do you decide which denials to work first?

How long does payment posting and reconciliation take?

What do you wish clinicians did differently in the note?

How the work happens today

Step	Who	Tool or system	Time	Hand-off to

Pain points

Pain point	How often (1–5)	How much it costs (1–5)	Score

Numbers worth pulling

Denial rate for the last 90 days	
Days from signed note to paid	
Claims waiting on follow-up today	

Patients

Who to interview: Your front desk and two or three patients, if you can · Interviewed: _____ · Date: _____

Questions to ask

How do patients get their home program and remember to do it?

How do patients reschedule today?

Where do patients drop off before finishing their plan of care?

What questions do patients ask about their bills?

How do you hear how a patient is doing between visits?

How the work happens today

Step	Who	Tool or system	Time	Hand-off to

Pain points

Pain point	How often (1–5)	How much it costs (1–5)	Score

Numbers worth pulling

Patients who finished their plan of care last quarter	
Average visits completed versus prescribed	
Billing calls in a typical week	

Practice leadership

Who to interview: The owner, partners or clinic directors · Interviewed: _____ · Date: _____

Questions to ask

How do you find out how each location is doing?

What do you check first every morning, and where?

Which problems do you usually hear about too late?

Where do referrals and new patients come from?

What would you measure if it were easy?

What has to be true for this to be worth it?

How the work happens today

Step	Who	Tool or system	Time	Hand-off to

Pain points

Pain point	How often (1–5)	How much it costs (1–5)	Score

Numbers worth pulling

Visits per provider per month	
Your top referral sources	
Hours your team spends on reports each month	

Build your plan

Your top three pain points

1.

2.

3.

Where to start

Owner

Target date

What success looks like in 90 days

What to decide about autonomy

Use the autonomy worksheet to decide what Aera runs on its own and what needs your approval.

Questions to ask WebPT

How does setup work for a practice our size, and how long until Aera is running on real work?

What comes over from our current system, and what do we need to prepare?

What training does each role get, and who do we call for help?

How do we set what Aera runs on its own and what needs our approval, and how do we change it later?

How do we see what Aera did and why?

Where is our patient data stored, and who can see it?

How does Founding Member pricing apply to our practice?

If we already use WebPT, what changes for us and what stays the same?

Your own questions