

Office Coordinator Daily Checklist

Date:

Office:

OC:

AM Checklist

- Clock in on time
 - Check Waiting room bathroom and make sure it is clean and filled with supplies
 - Check Voicemail
 - Huddle - What time did you start huddle?
 - Contact patients who have not confirmed for the day
 - Deposit completed by 8:30 AM?
 - Hygiene Columns full for today / tomorrow?
 - Any Openings today? Call to fill off ASAP List
 - Start Next day- (Change Dr., Hgy, location, check balances, verify Medicaid)
 - Communicate with doctor on scheduling changes for the same day
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Down time Checklist

- Review Schedule for Inaccuracies / Problems for that day
 - Call 3 patients on Unscheduled Treatment List: (please list)
1. _____ 2. _____ 3. _____
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- Review ASAP List to see if any patients can be scheduled
 - Monitor Lighthouse
 - Receive deliveries
 - Follow protocol for statements and invoices
 - Pick up waiting Room
 - Check 1 day / 1 week schedule, address any issues
 - Restock Printer / Pens
 - Restock Bathroom / clean as needed
 - Go through office cleaning checklist - instruct assistants/hygienists to help
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End of Day Checklist

- Scan all documents / enter all demographics
- Make sure all claims are deleted
- Send all pre-auth requests to insurance
- Anyone leave without paying....Comm Log?
- Clean Workstation / Area
- Vacuum as needed
- # of Days to to the next regular hygiene appointment?
- # of Days to the next NP Hygiene appointment?
- # of New Patients on today's schedule? # New patients seen?
- Any Openings in your schedule tomorrow?
- Tomorrow's scheduled production? Goal is:
- Yesterday's scheduled production? Yesterday's actual production?
- Count Petty Cash