

Office: _____

Pt Coordinator: _____

Week Of: _____

Daily						
Mon	Tue	Wed	Thu	Fri	Sat	
						Removed call forwarding. Checked messages at start of day, before lunch, after lunch, & before leaving for the day. Returned calls or gave messages to the appropriate staff member.
						Responded to all emails at start of day, before lunch, after lunch, & before leaving for the day.
						Completed Assigned Schedule Day Notes & Marked DONE
						Secured all appointments for 2 days ahead
						Verified insurance for all patients for tomorrow—filled out pink sheet, scan pink sheet into Document Center, update insurance notes. (every patient should have an updated pink sheet scanned in every 12 months or less)
						# of Recare Care calls made per day. Notes added to the Office Journal. (Call Matrix must be complete for the week)
						# of Recare appointments at time of Recare Call.
						# Recare Quick Letters Sent
						# of appointments made from the Unscheduled Appointment List (there should be no more than 30 days of appointments on the list)
						Scanned All Documents To Document Center
						Gave Providers their call sheets for every patient that had an injection
Weekly						
Date Completed:					Thank You cards mailed with referral gifts	
Date Completed:					Returned Mail Pieces Processed	
Weekly Report/Customer Service Achievements/Additional Projects						