Regional Manager: ______________________________

Week Of: ______________________________

<table>
<tr><th colspan="6">Daily</th></tr>
<tr><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th></th></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td>Respond to all emails at start of day, before lunch, after lunch, & before ending for the day at a minimum.</td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td>Respond to all phone calls before ending for the day.</td></tr>
<tr><td></td><td></td><td></td><td></td><td colspan="2">Check each office's Facebook page for weekly posts. There should be a ProVerus generated post and a post from the office. Contact any office that needs to post by Thursday. Verify that advertised special offer is correct and make changes if necessary.</td></tr>
<tr><td></td><td colspan="5">Verify that all checklists were turned in and are being completed. Help offices to complete any tasks they are struggling with by reviewing systems, teamwork, and time management. These are due to you & Dana no later than 10am on Monday.</td></tr>
<tr><th colspan="6">Weekly</th></tr>
<tr><td></td><td colspan="5">Witness Morning Huddle at a minimum of one office each week. Guide and train when necessary. (Rotate offices - i.e. do not repeat an office until you have been to all of your offices)</td></tr>
<tr><td></td><td colspan="5">Verify all calls have been made & are up to date per the Call Matrix at <u>each</u> of your offices. Identify any teams that need additional coaching to complete calls.</td></tr>
<tr><td></td><td colspan="5">Verify all 90 day insurance claims have been <u>called</u> on. Make sure office's aren't resending claims without speaking to the insurance company first. (Run Insurance Aging Report with Claim Status Notes)</td></tr>
<tr><td></td><td colspan="5">Verify all 60 day insurance claims have been <u>called</u> on. Make sure office's aren't resending claims without speaking to the insurance company first. (Run Insurance Aging Report with Claim Status Notes)</td></tr>
<tr><td></td><td colspan="5">Verify all 30 day insurance claims have been <u>called</u> on. Make sure office's aren't resending claims without speaking to the insurance company first. (Run Insurance Aging Report with Claim Status Notes)</td></tr>
<tr><td></td><td colspan="5">Verify statements are up to date using Collections Manager.</td></tr>
<tr><td></td><td colspan="5">Listen to a minimum of 3 calls from each office. Coach any teams that are not using correct verbiage.</td></tr>
<tr><td></td><td colspan="5">Send AR & call summary to ProVerus team - should include Total AR, AR over 90, Ins AR over 90, Total Ortho AR, Up to date on claims, Up to date on Matrix calls.</td></tr>
<tr><th colspan="6">Monthly</th></tr>
<tr><td></td><td colspan="5">Check each office's website to make sure staff is up to date, and correct offers are displayed.</td></tr>
<tr><td></td><td colspan="5">Run Insurance claims to process for each office. They should have zero. If they do not have zero, coach the Office Manager/Financial Coordinator and follow up until complete.</td></tr>
<tr><td></td><td colspan="5">Run Procedures not attached to Insurance Claims for each office. They should have zero. If they do not have zero, coach the Office Manager/Financial Coordinator and follow up until complete.</td></tr>
<tr><td></td><td colspan="5">Verify each office has sent accounts for pre-collection letters if they have been sent two statements.</td></tr>
<tr><td></td><td colspan="5">Very Dentrix campaigns are going out (email and text messages) by reviewing eCentral and test by making an appointment for yourself to see if you receive a reminder.</td></tr>
<tr><td></td><td colspan="5">Audit patient files to make sure that Front Office is collecting all information including photo identification, email addresses, cell phone numbers, and insurance cards. Verify that Front Office is updating forms (contact info, health history, & insurance eligibility) once every 12 months and scanning into the patient Document Center.</td></tr>
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	Audit End of Month reports that each of your Office Managers has audited. Coach the Office Manager on corrections needed. Email Dana when each office has completed corrections and you have completed your audits.
	Meet with each of your managers to discuss areas their teams are excelling at and areas where they need additional coaching. Develop a plan to provide coaching, and hold them accountable, then email the plan to the Office Manager and Dana for their records.
Ongoing	
	Spend 1-2 days in each office every week. If you have 5+ offices, you must visit each office at least once every two weeks.
	Listen to how staff interact with patients. Coach on greetings, verbiage, etc.
	Observe Patient Handoffs; coach when needed.
	Coach teams on asking for reviews and referrals.
	Verify clinical team is taking diagnostic quality x-rays, using camera, and following perio protocol.