

Office: _____

Office Manager: _____

Week Of: _____

| Daily | | | | | |
|-----------------------------|-----|-----|-----|-----|--|
| Mon | Tue | Wed | Thu | Fri | |
| | | | | | Back up changed. |
| | | | | | 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. |
| | | | | | After hour calls followed up & documented in Office Journal. |
| | | | | | Responded to all emails at start of day, before lunch, after lunch, & before leaving for the day. |
| | | | | | Completed Assigned Schedule Day Notes & Marked DONE. |
| | | | | | Call pts with a declined payment. |
| | | | | | # of Treatment Plan calls made & documented in the Office Journal. Need to call everyone on the list for this week per the Call Matrix. |
| | | | | | # of Treatment Appointments scheduled at time of call. |
| | | | | | # of Treatment Reminder letters/emails sent to patients you were unable to speak to. |
| | | | | | # of New Patient Limited calls made & documented in the Office Journal. Need to call everyone on the list for this week per the Call Matrix. |
| | | | | | # of Comp Exams scheduled from the NP Limited calls made. |
| | | | | | # of Ortho Consult calls made & documented in the Office Journal. Need to call everyone on the list for this week per the Call Matrix. |
| | | | | | # of Ortho Consult calls that resulted in an appointment scheduled. |
| | | | | | # of Accounts Inactivated per Matrix. |
| | | | | | Opened mail, paid invoices after checking for accuracy, and emailed copies to Dana. |
| | | | | | Audited all transactions for the day. |
| | | | | | Deposit taken to bank. |
| | | | | | Huddle prepared for next day. |
| Nightly | | | | | |
| | | | | | Transfer office phone to cell phone or voicemail, make sure all computers are signed out of Dentrix, & set alarm. |
| Weekly Celebrations & Notes | | | | | |
| | | | | | |

| Date Completed | Weekly |
|---|---|
| | Run Insurance claims to process every week(should have zero). |
| | Send pts to eService for letters that have not responded to call or email from last week, and pts that have received at least 2 statements but still have a balance over 60 days. |
| | Print & mail 1/4 of statements (A-F, G-M, N-S, T-Z) Circle which statements were sent. Statements should be sent even if pt has an outstanding claim. |
| | Run Payment Agreement Report. Contact any patient that is delinquent. Make sure all patients have been sent a statement. |
| | Call >30 day Guarantor Past Due. Send an email and leave a message if you do not speak to the patient. Message should only say your name, where you are calling from, and that it is important you hear back from them regarding their account. |
| | Call on >30 day Insurance Aging. Update claim status notes. If you have someone else calling on these, you must verify with them that it has been done. |
| | Call on >60 day Insurance Aging. Update claim status notes. If you have someone else calling on these, you must verify with them that it has been done. |
| | Call on >90 day Insurance Aging. Update claim status notes. If you have someone else calling on these, you must verify with them that it has been done. |
| | Verify all staff time clock punches. Email payroll spreadsheet to Dana by Monday at 9am every other week. |
| | Run EOM reports to check for accuracy every week |
| | Verify that all checklists are being completed. Help other staff to complete any tasks they are struggling |
| | Run Procedures not attached to Insurance Claims every week(should have zero) |
| | Reviewed Patient Pursuit report. |
| | Listened to 5 calls from Patient Pursuit and discussed with team answering the phone. |
| | Post a photo with a patient to Facebook that promotes the office and/or a provider. |
| | Email all checklists to Joy or Jen & Dana before leaving for the week. |
| Date Completed | Monthly |
| | Contact patients with credit balances if they are not scheduled for treatment, and all claims are closed. Issue refunds if patient does not schedule treatment. Send a copy of the patient ledger and check to Dana. |
| | Audit all transactions and complete End of Month Checklist. After auditing, send all reports to Joy or Jen and Dana. This must be done by 10:00am on the first business day of the month so doctor payroll can be completed on time. |
| Monthly Celebrations (use this section to share good stuff happening in your office) | |
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