RECEPTIONIST DAILY CHECKLIST:

1. Turn on your computer station.
2. Ensure computer backed up successfully.
3. Make coffee (if appropriate).
4. Make the music/ DVD selection and turn on stereo, or TVs.
5. Participate in the morning huddle.
6. Retrieve messages and set appropriate message (if needs change). Route all messages to the appropriate people.
7. Answer calls. Be very friendly with each patient while on the phone.
8. Enthusiastically greet patients and offer beverages. Assist new patients with filling out forms as needed.
9. Inform the assistant or hygienist that patient has arrived. Ensure that patients are not kept waiting.
10. If NEW PATIENT:

1. Activate the account and patient in computer.
2. Create a new patient chart.
3. Enter any extra info needed from the patient info form.
4. Provide the medical history and billing info form.
5. Enter the referral source for the new patient.

11. Ask established patients when they arrive if any of their information has changed since their last visit. Obtain Health History update and enter into chart.
12. Sort and distribute daily mail.
13. Meter all mail and place in the outside mailbox.
14. Check all charts to ensure progress notes are complete and all signatures are attached.
15. Liaise with Financial Coordinator and Scheduling Coordinator as needed.
16. Calculate and enter the new patient stat for the day.
17. Update on the appropriate phone answering message for dentist on call at end of the day.
20. Turn off workstation and printers.
21. Empty coffee containers in the reception room, turn off lights, TV, stereo, copiers, etc.