SCHEDULING COORDINATOR DAILY CHECKLIST:

1. Participate in daily huddle (present daily report).
2. Call any patients that were not confirmed from the previous day on today’s schedule.
3. Make any changes necessary on all schedules.
4. Schedule all appointments for patients from their treatment plan.
5. Give each patient an appointment card.
6. Give out recall reminder cards for each scheduled hygiene patient and make their next appointment as needed.
7. Review charts and treatment plans for additional treatment, which can be added to the next day’s schedule. Do this before confirming patients. This allows you to bring this to the patient’s attention during the confirmation call.
8. Confirm patients for the next day – remind patients to medicate in advance if necessary.
9. Group accepted treatment for that day that has not been scheduled.
10 Ask patients if they are available on short notice (short call). If so, indicate it in their appointment card screen.
11. Make calls daily from the short call list as necessary.
12. Make calls daily from the current Recall Report & the Overdue Recall Report.
13. Make calls daily to schedule appointments from the Accepted but Unscheduled Treatment Plan Report
14. Enter new lab cases and associate them with the next appointment 15. Check in all lab cases - make sure cases are in before confirming patients.
16. Be sure that the next day’s schedule is full and the production goal is met.
17. Fill in office screen and print routing slips for the next day.
18. Print schedules for the next day (if want hard copies).
19. Make calls to any patients that have missed their appointments that day and get them rescheduled.
20 Send out any missed appointment texts, emails, or letters necessary for the day.

FINANCIAL COORDINATOR DAILY CHECKLIST:

1. Participate in the morning huddle.
2. Answer phones (as back up for receptionist) – second in line.
3. Liaise with Treatment Coordinator and Scheduling Coordinator as needed.
4. Calculate and enter collections stat for the day.
5. Forward all new patient call-in information (forms) to Scheduling Coordinator for scheduling.
6. Research the accounts for the next day and determine the amount to be collected for each appointment (the collection sheet). Verify appointment notes for accuracy (fees and courtesies, etc.)
7. Check patients out, post treatment, collect money and post payments.
8. Post mail payments.
9. Post insurance payments.
10. Submit insurance (electronically) daily.
11. Send ECS as needed (usually two times a week) and print reports.
12. Follow-up on outstanding and rejected insurance. Re-submit any claims needed.
13. Work on accounts aging. Make the necessary patient contact calls, account letters, account contact notes, and any legal action needed.
14. File paperwork (account folders, EOBs, etc.; can be done by anyone with free time).
15.. Total up collections for the day (from daily register).
16. Send statements every month, on the first of the month.
17. Reconcile that days accounts with bank deposit.
18. Finalize the deposit slip (date, write in cash, stamp, and total).
19. Print the credit card “Audit List Report”. Compare and attach slips.
20. Shut down workstation.