

Office Coordinator Daily Checklist

Date:

Office:

OC:

AM Checklist

- ☐ Clock in on time
- ☐ Check Waiting room bathroom and make sure it is clean and filled with supplies
- ☐ Check Voicemail
- ☐ Huddle - What time did you start huddle?
- ☐ Contact patients who have not confirmed for the day
- ☐ Deposit completed by 8:30 AM?
- ☐ Hygiene Columns full for today / tomorrow?
- ☐ Any Openings today? Call to fill off ASAP List
- ☐ Start Next day- (Change Dr., Hgy, location, check balances, verify Medicaid)
- ☐ Communicate with doctor on scheduling changes for the same day

Down time Checklist

- ☐ Review Schedule for Inaccuracies / Problems for that day
- ☐ Call 3 patients on Unscheduled Treatment List: (please list)

1.
2.
3.
- ☐ Review ASAP List to see if any patients can be scheduled
- ☐ Monitor Lighthouse
- ☐ Receive deliveries
- ☐ Follow protocol for statements and invoices
- ☐ Pick up waiting Room
- ☐ Check 1 day / 1 week schedule, address any issues
- ☐ Restock Printer / Pens
- ☐ Restock Bathroom / clean as needed
- ☐ Go through office cleaning checklist - instruct assistants/hygienists to help

End of Day Checklist

- ☐ Scan all documents / enter all demographics
- ☐ Make sure all claims are deleted
- ☐ Send all pre-auth requests to insurance
- ☐ Anyone leave without paying....Comm Log?
- ☐ Clean Workstation / Area
- ☐ Vacuum as needed
- ☐ # of Days to to the next regular hygiene appointment?
- ☐ # of Days to the next NP Hygiene appointment?
- ☐ # of New Patients on today's schedule? # New patients seen?
- ☐ Any Openings in your schedule tomorrow?
- ☐ Tomorrow's scheduled production? Goal is:
- ☐ Yesterday's scheduled production? Yesterday's actual production?
- ☐ Count Petty Cash