Dental Front Office

Use this daily checklist to help you stay on track. There are lots of interruptions at the front desk. It's so easy to lose track of what you were doing. These tasks run from morning through the afternoon.

| Daily Check List | | | | | | | |  | Special Assignments |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Did you... | Mon | Tue | Wed | Thu | Fri | Note |  |  | There are special assignments found on page 2.  These are specific tasks done on an assigned day.  Weekly Management Systems help the dental front office get through all the necessary tasks. |
| Check Voicemail Messages (a.m.) |  |  |  |  |  |  |  |  |
| Previous Day Balances (Be Sure Before Sending Statements Out To Patients) |  |  |  |  |  |  |  |  |
| Send Patient Billing Statements - Every Day! |  |  |  |  |  |  |  |  |
| Fill Any Open Appt Times For Today \*\*Priority\*\* |  |  |  |  |  |  |  |  |
| Re-Confirm Any Unconfirmed Appointments For Tomorrow |  |  |  |  |  |  |  |  |
| Review Patient Charts For Tomorrow's Schedule For Updates Needed To Medical History Forms |  |  |  |  |  |  |  |  |
| Double Check Continuing Care Settings For Hygiene Patients Scheduled Tomorrow --Scheduled Procedures Are Correct |  |  |  |  |  |  |  |  |
| Print Patient Visit Forms Or Routing Slips For Tomorrow If Using These Forms |  |  |  |  |  |  |  |  |
| Confirm All Appointments 2 Days Out - Double Check Any Patient Balances & Note on Patient's Appointment |  |  |  |  |  |  |  |  |
| Send All Insurance Claims |  |  |  |  |  |  |  |  |
| **\*\*Special Daily Assignment\*\*\*** |  |  |  |  |  |  |  |  |
| Lunch |  |  |  |  |  |  |  |  |
| Check Voicemail Messages (p.m.) |  |  |  |  |  |  |  |  |
| Enter Insurance Payments & Mail Received |  |  |  |  |  |  |  |  |
| Double Check That Schedule Is Set For Tomorrow |  |  |  |  |  |  |  |  |  |
| Send Insurance Claims |  |  |  |  |  |  |  |  |
| **\*\*Special Daily Assignment\*\*** |  |  |  |  |  |  |  |  |
| For Tuesday, Wednesday & Thursday Of Each Week |  |  |  |  |  |  |  |  |
| **Week 1:** Tuesday - Patient Ageing Over 30 Days  Wednesday - Insurance Ageing Over 90 Days  Thursday - Unscheduled Hygiene Due Now  & New Patient Reports  **---------------------------------------------------------------------------**  **Week 2:** Tuesday - Patient Ageing Over 60 Days  Wednesday - Insurance Ageing Over 60 Days  Thursday - Unscheduled Hygiene Over 30 Day  & New Patient Reports  **---------------------------------------------------------------------------**  **Week 3:** Tuesday - Patient Ageing Over 90 Days  Wednesday - Insurance Ageing Over 30 Days  Thursday - Unscheduled Hygiene Over 60 Day  & New Patient Reports  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  **Week 4:** Tuesday - Patient Ageing Over 30 Days  Wednesday - Insurance Ageing Over 30 Days  Thursday - Unscheduled Hygiene Over 90 Days  & New Patient Reports |  |  |  |  |  |  |  |  |