

SAMPLE CA Daily Checklist

PLEASE INITIAL NEXT TO EACH

Day: _____ Date: _____

<p><u>AM Checklist</u> Turn on Music & TV Set Detech shows Turn on lights in rooms Check Voicemail Check cash drawer-\$130</p> <p><u>Daily Front Desk</u> Managed Care Paperwork Reminder Calls Call missed appts within 15 mins Schedule multiple appointments Copy insurance cards and Licenses</p> <p><u>Lunch</u> Print Credit Report Prove drawer Stock supplements Stock Ice Packs in Hallway Check water and cooler cups Clean up magazines Make copies of article of the week</p> <p><u>Gordon</u> Fax Log Records Releases Post Checks AR Read Manual Make Daily Task List and Follow</p> <p><u>Stephanie</u> Scanning NP Checklist Insurance Verifications Checking ROTs Read Manual Make Daily Task List and Follow</p>	<p><u>David</u> Billing Post Checks Post EFT's AR Foot Levelers Read Manual Make Daily Task List and Follow</p> <p><u>PM Checklist</u> Print Credit Report Batch Credit Cards Prove Drawer-leave \$130 Schedule for next day printed, highlighted, initialed (doctors desk) Pull all files for ROF's for next day and put on DRs desk Pull files for 1st ADJ and put on DRs desk Put all NPs/PUPs into OPAL Pull new CA checklist Shut off computers screens including Detech Turn off TV and Music Straighten Play Area Check water and cooler cups Check general cleanliness of office Shut off air/heat (fan set to auto)</p> <p>Collect all garbage in all rooms and bathrooms</p> <p>Check to confirm windows are locked</p> <p>Check ADJ room for cleanliness, brochures are in each rack, 2 pillows in each room and fans are turned off Lock Drawer</p> <p>Turn off lights</p> <p>Bring out Mail</p>	<p><u>PM Checklist continued</u> Remove laundry from each room and place in hallway basket Check toilet paper/towels in bathrooms, fill if needed</p> <p><u>Monday-</u> Change check in message according to list</p> <p><u>Tuesday-</u> <i>Tell Doctor if they have WOW verbally and put action form in their bucket</i> Make a copy of article of week and put in binder- Confirm Dr. Amy did this.</p> <p><u>Wednesday-</u> Prepare WOW packets for those signed up</p> <p><u>Thursday</u> – Send entire team weekly stats by text.</p> <p>* Check parking lot to see if anyone is downstairs. If not shut off lights downstairs and lock the doors accordingly.</p> <p>LOCK ALL VITAMINS AND PILLOWS CABINETS AND LOCK CASH DRAWER!</p> <p>THIS WOULD BE SIGNED AND PUT IN THE LEAD DOCTOR OR MANAGERS BUCKET AT END OF NIGHT.</p>
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