

DAILY FRONT DESK CHECKLIST #3 TO BE COMPLETED THROUGHOUT THE DAY

This checklist houses the specific task the front desk should be doing **THROUGHOUT THE DAY**.

As with previous checklists, this information will vary for every office. Between specialists' offices and general dental offices, you can imagine that the tasks may vary. Here is a recommended list, but we encourage you to sit down with your entire team to create a list that works well for your practice. These can be created in a Word document. You will find that you will edit the checklist often as your practice grows and changes.

Be sure to leave a place for employees to initial when something has been completed. Accountability is essential when working on a team. This checklist should be completed and turned in by the end of the day.

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Date:

Task: To Be Done Throughout The Day	Initial When Complete
Answer the phone calmly and confidently. Have a smile on your face and patience in your voice.	
Greet patients immediately upon arrival. For new patients, stand up and greet with a handshake. Be sure all new patients get an office tour by someone in the practice. (See OFFICE TOUR Section)	
Check patients in and out. Be sure to let the rest of the office know when patients have arrived. Monitor the schedule to keep patients seen on time. If a patient is 5 minutes late, contact that patient. Alert the team of any patient tardiness.	
Update patient contact info. (See PATIENT CONTACT UPDATE Section)	
Verify patient benefits a week in advance. Indicate co-pays due in the schedule. (See BENEFIT VERIFICATION Section)	
Schedule patients. No patient leaves without SOME next appointment scheduled.	
Work the Recare Reminders. (See RECAREREMINDER System)	
Work the 2-2-2 Follow Up System. (See 2-2-2 TREATMENT FOLLOW UP Section)	
Follow up with specialists, if needed.	
Listen for treatment plans being discussed with the doctor and be prepared to discuss benefit and financial arrangements. (See PRESENTING FINANCIAL CONSULTS Section)	
Collect deductibles and co-pays when applicable. (See CO-PAY CALCULATOR Section)	
Fill open appointment times for the next day. (See 5 VIABLE LISTS Section)	
Confirm upcoming appointments. This may be done via patient communication software and/or the front desk.	
Make sure all lab cases are back before confirming any type of seat appointment.	
Check/sort mail.	
Post payments. Send statements, if necessary.	
Scan/track EOB's.	
Submit dental claims with correct attachments.	
Have any patients quit the practice today? If so, who and why?	
Complete Post Care Calls and remind doctor of which patients require a post care call today by him/her. (See POST CARE CALLS Section)	
Feel as if everything is done? (See THERE IS ALWAYS SOMETHING TO DO Section)	
Support the rest of the team when necessary. (See CROSS TRAINING Section)	
Ask patients for referrals (See ASKING FOR REFERRALS Section)	
Ask patients for reviews (See ASKING FOR REVIEWS Section)	