

Patient Coordinator Monthly Checklist

Name: _____

MONTH							
WEEK 1	Mon	Tue	Wed	Thu	Fri	Sat	
Turn on and Off TV and Meida, Stock office supplies, referral cards Clean							
Fill openings in schedule from asap list, current week, next week							
Enter/verify new patient information/Routing Slip for next day							
Log in lab cases, schedule appointments and place them in designated area							
Send the feedback form to happy Patients via text							
Check answering machine/return calls (2x/day), demographic info							
Text/Call broken appointment patients- Reschedule Text addnotes							
WEEK 2	Mon	Tue	Wed	Thu	Fri	Sat	
Turn on and Off TV and Meida, Stock office supplies, referral cards Clean							
Fill openings in schedule from asap list, current week, next week							
Enter/verify new patient information/Routing Slip for next day							
Log in lab cases, schedule appointments and place them in designated area							
Send the feedback form to happy Patients via text							
Check answering machine/return calls (2x/day), demographic info							
Text/Call broken appointment patients- Reschedule Text addnotes							
WEEK 3	Mon	Tue	Wed	Thu	Fri	Sat	
Turn on and Off TV and Meida, Stock office supplies, referral cards Clean							
Fill openings in schedule from asap list, current week, next week							
Enter/verify new patient information/Routing Slip for next day							
Log in lab cases, schedule appointments and place them in designated area							
Send the feedback form to happy Patients via text							
Check answering machine/return calls (2x/day), demographic info							
Text/Call broken appointment patients- Reschedule Text addnotes							
WEEK 4	Mon	Tue	Wed	Thu	Fri	Sat	
Turn on and Off TV and Meida, Stock office supplies, referral cards Clean							
Fill openings in schedule from asap list, current week, next week							
Enter/verify new patient information/Routing Slip for next day							
Log in lab cases, schedule appointments and place them in designated area							
Send the feedback form to happy Patients via text							
Check answering machine/return calls (2x/day), demographic info							
Text/Call broken appointment patients- Reschedule Text addnotes							