	Patient Coordinator Monthly Checklist Name:_____								
MONTH	Review and grade on no show percentage- Target 30%, Achieved-								
	Percentage conversion of calls - Target 90% Achieved-								
WEEK 1									
	DAILY	**Mon**	**Tue**	**Wed**	**Thu**	**Fri**	**Sat**		
	Fill openings in schedule from asap , recall, uncompleted treatment lists								
	Call all patients 48 hours ahead of the schedule to confirm/remind patients								
	Call unconfirmed 24 hours ahead to confirm and schedule missing family								
	Call early in the morning for Same Day reminder/ missing family								
	Review and Clear all emails and Revenuewell/Open Dental Alerts								
	Text/Call broken appointment patients- Reschedule Text addnotes								
	Complete post op calls for the previuous day treatment calls								
WEEK 2									
	DAILY	**Mon**	**Tue**	**Wed**	**Thu**	**Fri**	**Sat**		
	Fill openings in schedule from asap , recall, uncompleted treatment lists								
	Call all patients 48 hours ahead of the schedule to confirm/remind patients								
	Call unconfirmed 24 hours ahead to confirm and schedule missing family								
	Call early in the morning for Same Day reminder/ missing family								
	Review and Clear all emails and Revenuewell/Open Dental Alerts								
	Text/Call broken appointment patients- Reschedule Text addnotes								
	Complete post op calls for the previuous day treatment calls								
WEEK 3									
	DAILY	**Mon**	**Tue**	**Wed**	**Thu**	**Fri**	**Sat**		
	Fill openings in schedule from asap , recall, uncompleted treatment lists								
	Call all patients 48 hours ahead of the schedule to confirm/remind patients								
	Call unconfirmed 24 hours ahead to confirm and schedule missing family								
	Call early in the morning for Same Day reminder/ missing family								
	Review and Clear all emails and Revenuewell/Open Dental Alerts								
	Text/Call broken appointment patients- Reschedule Text addnotes								
	Complete post op calls for the previuous day treatment calls								
WEEK 4									
	DAILY	**Mon**	**Tue**	**Wed**	**Thu**	**Fri**	**Sat**		
	Fill openings in schedule from asap , recall, uncompleted treatment lists								
	Call all patients 48 hours ahead of the schedule to confirm/remind patients								
	Call unconfirmed 24 hours ahead to confirm and schedule missing family								
	Call early in the morning for Same Day reminder/ missing family								
	Review and Clear all emails and Revenuewell/Open Dental Alerts								
	Text/Call broken appointment patients- Reschedule Text addnotes								
	Complete post op calls for the previuous day treatment calls								