

Insurance/Treatment Coordinator Monthly Master Checklist

MONTH:		1st	15th	
Collection letter 90-120 days				
Prep/submit accounts for collection				
WEEK 1				
Mail statements A-F				
Call in repair requests				
	Follow up on unpaid claims			
	Collection calls for patient balances 6			
	Process refund requests			
	Run credit balance report (call to schedule or			
	Post Comp. Dent. Fin. Payment to pt accounts			

DAILY	Mon	Tue	Wed	Thu	Fri	Sat
Creates insurance claims (inc. attachments)						
Complete Chart Audit before Creating the Claim						
Submit addtnl info requested for insurance/ pre-est						
Verify New Patient Routing Sheet						
Verify ins. for when insurance team is not available						
Discuss Financial Arragemnets with Patients						
Checkout Patients						
Call patients needing follow up for treatment						
Count & log petty cash, Balance deposit						
Run credit cards for monthly payments						
Chart prep for huddle, fill out checklist						
Open mail and distribute to appropiate parties						

WEEK 2				
Mail statements G-L				
Call in repair requests				
	Process refund requests			
	Run credit balance report (call to schedule or			
	Post Comp. Dent. Fin. Payment to pt accounts			

DAILY	Mon	Tue	Wed	Thu	Fri	Sat
Create insurance claims (inc. attachments)						
Complete Chart Audits						
Submit addtnl info requested for insurance/pre-est						
Verify New Patient Routing Sheet						
Verify ins. for when insurance team is not available						
Discuss Financial Arragemnets with Patients						
Checkout Patients						
Call patients needing follow up for treatment						
Count & log petty cash, Balance deposit						
Run credit cards for monthly payments						
Chart prep for huddle, fill out checklist						
Open mail and distribute to appropiate parties						

WEEK 3				
Mail statements M-R				
Call in repair requests				
	Process refund requests			
	Run credit balance report (call to schedule or			
	Post Comp. Dent. Fin. Payment to pt accounts			

DAILY	Mon	Tue	Wed	Thu	Fri	Sat
Create insurance claims (inc. attachments)						
Complete Chart Audits						
Submit addtnl info requested for insurance/pre-est						
Verify New Patient Routing Sheet						
Verify ins. for when insurance team is not available						
Discuss Financial Arragemnets with Patients						
Checkout Patients						
Call patients needing follow up for treatment						
Count & log petty cash, Balance deposit						
Run credit cards for monthly payments						
Chart prep for huddle, fill out checklist						
Open mail and distribute to appropiate parties						

WEEK 4				
Mail statements S-Z				
Call in repair requests				
	Process refund requests			
	Run credit balance report (call to schedule or			
	Post Comp. Dent. Fin. Payment to pt accounts			

DAILY	Mon	Tue	Wed	Thu	Fri	Sat
Create insurance claims (inc. attachments)						
Complete Chart Audits						
Submit addtnl info requested by insurance/pre-est						
Verify New Patient Routing Sheet						
Verify ins. for when insurance team is not available						
Discuss Financial Arragemnets with Patients						
Check Out Patients						
Call patients needing follow up for treatment						
Count & log petty cash, Balance deposit						
Run credit cards for monthly payments						
Chart prep for huddle, fill out checklist						
Open mail and distribute to appropiate parties						