

# CA Checklist

💖💖🥰 FUN - CARING - LOVING - KIND 🥰💖💖

	MON	TUES	WED	THURS
<b>MORNING DUTIES</b>				
Turn on BACK LIGHTS				
X-ray Room: LIGHTS   XRAY   COMPUTER <b>p/w = vieworks</b>				
Turn on & login TABLETS				
Turn on BILLING & DOC Computers				
Tidy BATHROOMS   PAPER PRODUCTS				
Clean THERAPY, DOC & OFFICE SPACE				
Check VOICEMAIL   EMAILS   TEXTS				
Check 43 FOLDERS				
Check CALENDAR for EVENTS				
Turn on TV				
7 mins. before: LIGHTS   SIGN   DOOR				
<b>MID-DAY DUTIES</b>				
Tidy BATHROOMS Check TOILET PAPER   PAPER TOWELS				
Clean TABLES   CHI MACHINES   VIBE Alcohol TELEPHONES				
Clean DOC & OFFICE SPACE				
Vacuum OFFICE				
<b>END-OF-DAY DUTIES</b>				
MOVE Missed Appointments to <b>9:15 AM</b>				
Print SCHEDULE				
Plug in both TABLETS				
Shut down FRONT DESK COMPUTER				
Turn off TV				
Turn off LIGHTS   Flip SIGN   Lock DOOR				
Gather BELONGINGS				
Turn BACK LIGHT				
<b>SPECIALS</b>				
<b>Area of Focus</b>				
<b>EVENTS</b>				

<b>WEEKLY DUTIES</b>			
<b>MON</b>	<b>TUES</b>	<b>WED</b>	<b>THURS</b>
	<b>Take Out OFFICE TRASH</b>		<b>Take Out OFFICE TRASH</b>
	<b>ORDER DAY</b> Supplements Office Supplies		
		<b>DOORS</b> Clean DOORS Vacuum BEHIND DOORS	
			<b>END OF WEEK</b> Prepare DEPOSIT Send Weekly CLAIMS
			<b>BATHROOM BIG CLEAN</b> Sinks   Toilets   Mirrors Take out Trash Mop Floor
			<b>OFFICE BIG CLEAN</b> Dust all Horizontal Surfaces Polish Wooden Cabinets Dust Chairs Polish Steel Garbage Cans

## PRE-SHIFT MEETING AGENDA

### MORNING

#### Checklist

- Anything that did not get completed
- Events for the day

#### Specials

- Scheduled New Patients
- Report of Findings Activities

#### Daily Schedule

Emails | Texts | Voicemails | Mail

#### Old Business

- Tasks or activities from the 43-Folders
- Carry-over activities

#### New Business

- New Activities
- Upcoming events

### AFTERNOON

#### Specials

- Scheduled New Patients
- Report of Findings Activities

#### Daily Schedule: Changes

Emails | Texts | Voicemails | Mail

#### Old Business

- Tasks or activities from the 43-Folders
- Carry-over activities

#### New Business

- New Activities
- Upcoming events

## THURSDAY CHECKLIST

AM	PM
Prepare DEPOSIT Send Weekly CLAIMS	<b>Prepare for MONDAY</b> <input type="checkbox"/> Clean Checklist <input type="checkbox"/> Print Monday's Schedule
Input last week's numbers into the Statistics	<b>Reconcile EOBs</b> <input type="checkbox"/> 835s (electronic EOBs) <input type="checkbox"/> Paper EOBs <input type="checkbox"/> Check InfinEDI for Errors/Fails
	<b>Problem Resolution</b> <input type="checkbox"/> EOBs <input type="checkbox"/> Patient Balances <input type="checkbox"/> Follow up on unpaid visits
	<b>Review All Things Money (Payment Journal)</b> <input type="checkbox"/> Verify money moved appropriately <input type="checkbox"/> Know what every entry is
	<b>BATHROOM BIG CLEAN</b> <input type="checkbox"/> Sinks   Toilets   Mirrors <input type="checkbox"/> Take out Trash <input type="checkbox"/> Mop Floor
	<b>OFFICE BIG CLEAN</b> <input type="checkbox"/> Dust all Horizontal Surfaces <input type="checkbox"/> Wood cleaner: Polish Wooden Cabinets <input type="checkbox"/> Dust Chairs/Chair legs <input type="checkbox"/> Clean all Monitors (green/white glass cloth) <input type="checkbox"/> Mop entry tile <input type="checkbox"/> Stainless polish: Garbage cans
	<b>Mail in mailbox</b> <b>Take Out OFFICE TRASH</b>

<b>First Thursday</b> <input type="checkbox"/> Service Higgins (Roomba) <input type="checkbox"/> Google Reviews	<b>Third Thursday</b> <input type="checkbox"/> Service Higgins (Roomba) <input type="checkbox"/> Recalls
<b>Second Thursday</b> <input type="checkbox"/> 30-60-90 Report <input type="checkbox"/> Wipe-off Board: Referrals	<b>Fourth Thursday</b> <input type="checkbox"/> Wipe-off Board: Your choice <input type="checkbox"/> Change paper signage <input type="checkbox"/> Birthday Postcards for next month
	<b>Fifth Thursday</b> <input type="checkbox"/> Shredding <input type="checkbox"/> Baseboards, Corners (upper+lower)