



Month/Yr _____

General Admin			
Report	Notes	Date Completed	Initials
By 5th			
Enter #'s into Corporate Metrics (<i>Shanua</i>)			
By 10th			
Complete CIP (Communication Improvement Program) (<i>Shauna</i>)			
Review audit of all office's books with bookkeeper (<i>Dr B</i>)			
Before Corporate Meeting			
Compile online patient review Presentation or \$5 credit for Google review (<i>Shauna</i>)			
Monthly update Cascade Feedback section portal (<i>Dr B</i>)			
By End of Month			
Current with Patient Mailings (<i>Andrea</i>)			
Newsletter (<i>Andrea</i>)			

	Payson	Springville	SpanishFork	LittleChompers
1st-15th				
Membership Plan renewal letters (<i>Nikole</i>)				
Verify Office Manger Reports Done (<i>Olivia</i>)				
Send Bills (<i>Olivia</i>)				
By End of Month				
20 day Outstanding Ins Report(<i>Rachel, Erika, Emily&Kallie</i>)				
Insurance Overpaid report (<i>Rachel, Erika, Emily</i>)				
Verified All EOBs (<i>Rachel, Erika, Emily, Kallie, Kinsey</i>)				
Send Collections Accounts to Dr & OM (<i>Olivia</i>)				
Outstanding Credits (<i>Olivia/Nikole</i>)				
Send Collections Accounts to Collections (<i>Olivia</i>)				
Online payments reconciled (<i>Nikole</i>)				
Weekly				
Shauna Check in with OM (<i>Shauna</i>)				
Check with OM for Tech support needs (<i>Shauna</i>)				
Daily				
Automatic Credit Cards payments Days missed? (?)				
Daily Deposits Days missed? (?)				
Post Op Calls Days missed? (<i>Sierra</i>)				
New Patient Thank Yous sent (<i>Nikole</i>)				

Assignments:

- Sierra: Follow up list & Post Op follow-up calls
- Rachel: EOBs Payson
- Emily & Kallie: EOBs Springville
- Erika: EOBs Spanish Fork & Little Chompers
- Olivia: Billing and Collections: All offices, Social Media
- Andrea: Mailings, Newsletter, Verify 2nd Check Ins
- Nikole: Daily Process all payment plans M W Th F, Outstanding Credits
- Kellie: Process all payment plans: Tuesday, Database maintenace
- Shauna: Verify 2nd Check Ins