

# STAFF CHECKLIST

## OPENING CA

- Sonos On
- Check Email
- Check Social Messages
- Printer On
- RC's
- Check/Change Voicemail
- Water Machine On
- Glasses Tray Full
- Floors
- Check Front Desk
- Empty Toilet Bins
- Check FB Messages

## DURING MORNING

### CA 1

- Check 2<sup>nd</sup> Call Status/Previous DNA's
- PM RC's
- Go to Bank (Wed)
- Check Payments (after Clients have gone)

### CA 2

- New Files Processed (Referral Source, Phone #, Details)
- B-Day Card Sticky Note
- Pull Files for Next Week
- Check Files for Next Day
- Tissues/Mags/Headroll
- Check Exam Forms/Room
- Literature/Nerve Charts
- Check Massage Room
- Post Out to Post Box
- Check Herbal Teas

## DURING AFTERNOON

### CA 1

- Check Messages
- Next Day RC and New Client
- Confirmation
- Toilet/Litchen/Stationary Check
- Reception Surfaces

### CA 2

- Check Forms Behind Desk
- Check Front Desk Stocks (specifics?)
- Storage Room Checks
- New Clients all on Software
- Add New Clients to Perfect Patients Email
- Reception Trash

## AFTER CLIENTS HAVE LEFT

### CA 1

- Chiro's Made Calls/RV Books
- Change Voicemail
- Check Payments/Cash in Locked
- Cabinet
- Feedback Friday

### CA 2

- Lights Off/Exam Rooms
- Print Tomorrow's Schedule
- Water Off
- Printer/Music/Keyboard/Mouse Off
- Feedback Wednesday

# STAFF CHECKLIST

## 1<sup>st</sup> WEEK OF MONTH

### CA 1

- New Client Count
- Direct Debits
- Organise Blue Binders
- Advertising Package for Talks (for following month)
- Float - Check Change

### CA 2

- Charge Keyboard and Mouse
- Referral High Five Names
- Client of the Month - Take Photo and put on Board
- Wash Fake Plants
- Rotate Magazines
- Clean Face Part Benches
- Fill Handsoap
- Check Water Bottles
- Check Herbal Teas Expiry Date
- Spinal Assessment Forms Printed and on Clipboards
- Check Float in Filing Cabinet
- Float Notes Taken to the Bank to turn into Change
- Petty Cash Receipts Scanned to Hester
- Scan Check List to hester
- Banking to Bank
- Report Visits in Diary

## DC CHECKS

- Finances
- Booked Out of Diary
- Cleanliness
- Files all put away
- Clipboards full with paperwork
- Monday - count money from Post 1<sup>st</sup> Adjustment Calls
- Report Forms filled in and given to CA's
- Recalls completed and noted in files

# STAFF CHECKLIST

## ADMIN CA

- Check Cash From Previous Week
- Does Cash Match the amount on Cliniko
- Do Amounts Match Cliniko - card payments, etc.
- Banking Deposit
- Posters for Talks/Sign Up Sheets
- Clearing Clutter
- Checking Status of WCP's
- Preparing Events
- Liaising with Hester about Events
- Birthday Cards - print list, get chiros to check list, prepare cards for the month
- Stock Check
- Leaflet Check
- Stock Take
- Garbage Out
- Check Cleaners Work
- Contact Tradesmen as needed
- Sent out emails for talks
- Check Files are prepared for the week
- Scan invoices to Hester
- 1x month walk through the practice as a new client - what needs updating?
- Referral High Fives
- Charge Keyboard and Mouse
- Referral High Five Names
- Client of the Month - Take photo and put on Board
- Wash Fake Plants
- Rotate Magazines
- Clean Face Part Benches
- Fill Handsoap
- Check Water Bottles
- Check Herbal Teas Expiry Date
- New Client Count
- Direct Debits
- Organise Mail/Invoices
- Organize Blue Binders
- Advertising Package for talks (for following month)
- Float - check change
- Check Front Desk Stocks (specifics?)
- Storage Room Checks
- New Clients all on Software
- New Clients Added to Perfect Patients Email

# STAFF CHECKLIST

## ADMIN CA CONTINUED

- Reception Trash
- Toilet/Kitchen/Stationary Check
- New Files Processed (referral source, phone #, details)
- B-DAY Card Sticky Note
- Pull Files for Next Week
- Check Files for Next Day
- Tissues/Mags/Headroll
- Check Email Forms/Literature in Rooms/Nerve Charts
- Check Massage
- Post Out to Post Box
- Check Herbal Teas
- Purchase Fruit
- Insurance Payments Submission
- Note WCP Renewals on Software Notes
- Client of the Month
- Referral Basket
- Notify Winners of Client of Month and Referral Baskets