Financial Zone Onboarding & Reboarding Worksheet

	7-10 times	7-10 times	90 days
Top Priorities that CANNOT wait	How many times have you observed this task?	How many times have you performed this task with supervision?	How long has this been on your checklist?
Mondays- Review all EFT monies that came in directly			
Mondays - Review insurance payments in mail from last week			
REX prep- finances			
Monthly swipes credit card processing			
NPRs financial plans			
AR finances			
Patient requests			
Emails			
Tuesdays - Weekly billing			

	7-10 times	7-10 times	90 days
Priorities that can wait if need be	How many times have you observed this task?	How many times have you performed this task with supervision?	How long has this been on your checklist?
Check patient referrals for 3rd parties			
Posting EOBs (Can wait but NOT more than 2 weeks)			

Staying on the Tasks

1. Use personal daily google calendar with tasks entered for each day
   a. Print the whole week's personal schedule at the start of the week to see the overview of the whole week's tasks
2. After PRES the daily schedule, write names of people to address finances with on your own personal schedule
3. Enter alerts in software for front desk to help address financials
4. Use a physical notepad for questions or concerns to address between front desk, doctor, and financial zones and bring that notepad to weekly O3 meetings
5. Mark off items completed in notepad to reduce extra verbal communication