Front Desk Wrap Up

All phone calls are made.

Platinum
- ❑ Clear off Schedule Book- all patients R – Q
- ❑ Balance - , Arrival – OK on today's date – continue - check to be sure everyone has been billed (if not, go to that patient and "add transaction")
- ❑ Balance - , Duplicate Transactions.
- ❑ Print Schedules – R (appoint) – J (appt schedule) – select tomorrows date – okay
     Make copies of schedules for each team member

- ❑ Print Recalls – L list, report – S practice diagnosis & recalls manager – escape – 2 warning list – F6 to print (to Front Desk)
- ❑ Fill in the Beat Sheet: L list, report – I Summary- 2 general summary- OK for today's date - yes : Write Total Patient Visits on the beat sheet.
- ❑ Balance, Professional, Escape, Transaction, OK and print

Deposit
- ❑ Add up Control Log. (grand total of all pages on first page)
- ❑ Open Fortis and be sure total matches the control log. Reports, Transactions
- ❑ Write out deposit slip. Be sure it matches control log. (If change is needed put the amount needed on post-it on the deposit slip.)
- ❑ Copy all Checks and deposit slip and any gift certificates. **Be sure to take checks off of the copier.**
- ❑ Count Cash Box & initial. (If smaller bills are needed, put in the bank envelope with a post-it.)
- ❑ Control log, copies of checks, & Transaction report go in stats folder in financial office.

Crosscheck tomorrow's pulls with the schedule.

Put report files and AR exam travel cards on steps with copy of schedule

Turn off all computers and TV's. Turn off tablet last.

Run Index of Platinum on the server. Server PW is Omnicomp1, Task shortcut,   Index

Turn off heat or air conditioning and/or close windows.

Be sure Front Desk/ Office is clean & clear of clutter.

Turn off all lights & be sure everything is locked up.