

Date: \_\_\_\_\_

Completed By: \_\_\_\_\_

Completed	Carry over to next day	Task	
		<b>Take the clinic phone off of night mode and check voicemails.</b>	MORNING
		<b>Verify charts of today's appointments in EPM:</b> <ul style="list-style-type: none"> <li>Is the insurance correct according to MINITS?</li> <li>Is the basic data entry correct (Name, DOB, SIN, etc) according to Discovery?</li> <li>Does patient need immunizations or refills?</li> <li>Does the patient have a paper chart? Pull it and make sure all appropriate documents have been scanned.</li> </ul>	
		Check clinic inventory – meds, vaccines, supplies, registration packets, etc.	
		<b>Check-in appointments as patients arrive:</b> <ul style="list-style-type: none"> <li>Follow AutoFlow while verifying SIN and insurance status.</li> <li>Create Encounter Fee Ticket with label and put into arrival folder along with Charting Checklist and Patient Data Form. Give to provider.</li> </ul>	
		Perform a temperature check on the vaccine fridge.	
		<b>Make sure all appointments have either been checked in or rescheduled.</b>	AFTERNOON
		<b>Checkout today's appointments in EPM:</b> <ul style="list-style-type: none"> <li>Gather Encounter Fee Tickets from providers.</li> <li>Does the insurance need to be changed on the Encounter?</li> <li>Does the Superbill match the Encounter Fee Ticket?</li> <li>Have all lab orders been submitted?</li> <li>Does a protocol or recall plan need to be assigned?</li> <li>Does a follow-up appointment need to be booked?</li> <li>Are there documents that need to be scanned?</li> </ul>	
		Put completed Encounter Fee Tickets in file folder ready to be sent with courier.	
		Make sure paper charts have received their archiving dots.	
		Scan all documents from today's appointments – Clinic Consents, Data Privacy Acknowledgement, Mental Health Parent Consent, any other important documents.	
		Ensure all lab results and E-Rx refills are matched up in EHR.	
		<b>Run the Daily Appointments report for the next day.</b>	
		Perform another temperature check on the vaccine fridge.	
		File any paperwork that needs attention or has not yet been scanned. Use daily or provider folders.	
		Write passes/text appointment reminders for next day's appointments.	
		<b>Lock all cabinets with PHI, charts, medications, etc.</b>	
		Put phone on night mode.	
		Order meds and supplies from MDHFS.	WEEKLY
		Order supplies from Fairview.	
		Complete Family Planning Waiver applications and renewals.	
		Clean Front Desk area	
		Address any appointments not checked-out.	

**Notes:**