

PEAK PERFORMANCE DENTAL SOLUTIONS

Daily Schedule Preparation Checklist

Prepare every patient visit for success.

Appointment Status

- Appointment confirmed
- Reason for visit verified
- Appointment length appropriate

Account

- Check outstanding insurance claims
- Review patient balance
- Audit account so financial questions can be answered

Treatment

- Review previous visit
- Verify today's treatment
- Confirm treatment codes
- X-rays/photos available
- Referral reports received
- Lab case in office or confirm with lab
- Patient understands estimated cost

Insurance

- Verify eligibility
- Check remaining annual maximum
- Review X-ray frequency limitations
- Insurance breakdown entered correctly
- Check for downgrades or Missing Tooth Clause
- Review insurance treatment history

Patient Information

- Verify demographics
- Update medical history
- Confirm referral source
- Patient photo on file

Hygiene

- X-rays due?
- Doctor exam due?
- Fluoride covered?
- Sealants covered?
- Perio charting due?
- Request outside X-rays if needed
- Follow-up on specialist referrals

PPDS PRO TIP

Review the next day's schedule before leaving the office. Identifying insurance issues, outstanding balances, lab cases, and incomplete records ahead of time helps reduce delays, improve collections, and create an exceptional patient experience.

Website: www.peakperformancedentalsolutions.com

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