

MORNING MEETING CHECKLIST

Please bring:

- Copies of today's schedule for every team member
- Pre-checked charts for all patients of record on today's schedule
- Appointment Information Slips for all new patients on today's schedule
- One copy of tomorrow's schedule
- Yesterday's production and collection numbers
- Month-to-Date production, collection and scheduling numbers

- 1) Today's Schedule - Problem areas; Schedule changes _____
- 2) Emergency and Catch-Up Time - Clinical staff dictates preferred times _____
- 3) Next Two Available Production Blocks _____ / _____
- 4) Next Two Available New Patient Blocks _____ / _____
- 5) Review Today's Patients for the following:
 - a) Pending treatment and pre-approvals? b) Teeth / areas on watch? c) Birthdays?
 - d) Special needs? e) Financial Concerns? Prior Balance? Today's Financial Arrangements?
 - f) Signed Privacy Form? g) Health History Update h) Registration / Cell Phone Update
 - i) Pre-medication
- 6) Review Today's Restorative Patients:
 - a) Appointment Information Slips for new patients
 - b) Emergency patient information
 - c) Before / After Photos or Intra-Oral Photographic Series?
 - d) Signed Dental Materials Fact Sheet
 - e) Informed Consent f) Additional Documentation
- 7) Review Today's Hygiene Patients:
Patients requiring:
 - a) Probing? b) Doctor exams (and timing)? c) X-rays? d) Future PCE / FMX?
 - e) IOC exams f) Intra-Oral Photographic Series?
- 8) Yesterday's Schedule & Productivity -- Did We Reach Daily Goal? _____ / _____

Daily Goal Actual
- 9) Daily Goal for Today -- Has it been reached? How can we help? _____ / _____

Daily Goal Scheduled
- 10) Production and Collection _____ / _____

_____ / _____ MTD Production Goal Production To Date	_____ / _____ Total Monthly Production Goal Prod Scheduled to Month End _____ / _____ MTD Collection Goal Collection To Date
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- 11) Lab Cases Needed for Tomorrow? _____
- 12) Consults Ready for Next Three Days? _____
- 13) Any Team Member Needing a Little Help Today? Anything to celebrate? _____
- 14) Leadership Statement or Focus For The Day _____