

# The Morning Case Management Checklist

(All done in 15 minutes or less. *Sample*. Customize to fit your office.)



- \_\_\_ 1. **Discipline:** Everyone present at \_\_\_ o'clock for meeting.
- \_\_\_ 2. **Joke:** A "Dad" joke, a story, a cartoon. Should be funny. One joke a day, and everyone takes turns.
- \_\_\_ 3. **Case Management:** Quickly look at each patient that is coming in for that day and review what each might need, including any of the following (you may need to skip some patients that are doing well if you are heavily scheduled):
  - \_\_\_ Last visit (+ or -)
  - \_\_\_ Therapy
  - \_\_\_ Re-exam
  - \_\_\_ Re-x-ray
  - \_\_\_ Re-report
  - \_\_\_ Financial Consult.
  - \_\_\_ Doctor's paperwork
  - \_\_\_ Tx Plan
  - \_\_\_ Multiple appt. card
  - \_\_\_ OTC collections
  - \_\_\_ New Pt Lecture
  - \_\_\_ CEP lecture
  - \_\_\_ Referrals
  - \_\_\_ Other
- \_\_\_ 4. **Office Management (Optional):** Weekly "score card". Review the performance monitors (statistics) of the office, including:
  - \_\_\_ MTD stats (mostly just doc.)
  - \_\_\_ WTD stats (mostly just for doc.)
  - \_\_\_ Yesterday's Stats
  - \_\_\_ What is on today's appointment book
- \_\_\_ 5. **Goals/Vision (Optional):** Set some realistic goals for today, review weekly/monthly goals, visualize them coming true.  
\_\_\_ Office Visits: \_\_\_\_\_ NPs: \_\_\_\_\_ % Kept Appts: \_\_\_\_\_ Other: \_\_\_\_\_
- \_\_\_ 6. **Miscellaneous(Optional):** Minor and very quick announcements, questions, etc.
- \_\_\_ 7. **Inspiration/Motivation (Optional):** (Quote, Patient Success Story, etc.)

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