



Daily Cross-Check

The Daily Cross-Check is a process to ensure the accuracy of a few key areas.

These areas are key because they impact the wages of practitioners, correct accounting details in patient files and provide a back-up process to ensure notes are written for all patient treatments and patients remain in the system.

At the end of each day, or at the start of the following day, move through EVERY patient that had an appointment scheduled in the appointment book/s and step through the check-list below, correcting any errors you identify straight away.

- Provider** - is the correct provider identified for each of the treatment lines?
- Account created?** - even if the patient did not pay the account, was it created?
- Account balance and deposit** - do the figures in the balance and refund area make sense? (Sometimes we can add extra figures when creating receipts).
- Note** - have the treatment notes been entered by the clinical team? If not, provide a reminder note for them.
- Next appointment** - has the next appointment been scheduled for the patient? If no, has the patient been allocated a follow-up communication or is the recall date correct?
- Future Recall Date** - ensure the patient has a future recall date in the system to ensure they do not get lost in the system.