



Daily Task Sheet

As needed throughout the day:

- ☐ Check in patients
- ☐ Check out patients
- ☐ Answer calls and messages
- ☐ Respond to missed calls and messages

8:30-8:45AM

- ☐ Clock in and log into all accounts.
- ☐ Check voicemails and text messages for any patients who are not going to make it today.
- ☐ Adjust therapists schedules accordingly and reschedule anyone who can't make it.

8:45-9:00 AM

- ☐ Turn on lights and music.
- ☐ Make sure beverages and snacks for patients are ready
- ☐ Start laundry from the day before.

9:00-10:00 AM

- ☐ Check for shift notes left the night before.
- ☐ Respond to any other messages or faxes that have come in that weren't emergent.
- ☐ Check on the cancellation list for any spots that might need filled.
- ☐ Attempt to schedule any new leads.

10:00-11:00 AM

- ☐ Send superbills
- ☐ Check the previous day's dashboard to make sure all payments have gone through
- ☐ Work on any payment plan issues.
- ☐ Move laundry to the dryer and start a second load if necessary.

11:00-12:00 PM

- ☐ Send out Initial Evaluation reminders.
- ☐ Run any payments that need to be made manually for payment plans.
- ☐ Verify any insurance for new patients who are interested. Respond to them with the information and leave it in the "Private Notes" section of their dashboard. If they are new leads who are not currently scheduled, leave the insurance verification form filled out and make sure they are updated on the CRM.

12:00-12:35 PM

- ☐ Do inventory and update checklist

12:35-1:00

- ☐ Fold and put away laundry



- ☐ Send any thank you's that need to go out.
- ☐ Get the mail and sort.

1:00-1:30

- ☐ Follow up on any tasks that are undone and make sure notes are updated

1:30-1:40 PM

- ☐ Make sure laundry is switched over to guarantee dryer can be finished before end of shift

1:40-3:00 PM

- ☐ Check for any missed calls or voicemails to catch up on. Call any missed calls or voicemails back the same day.
- ☐ GoHighLevel check up
 - ☐ Go to the **Conversations** tab and look at any unread messages or calls. Make sure they are resolved before moving forward.
 - ☐ Go into **Contacts** tab on the sidebar and click on "Tasks" in the top bar of the screen. First click "Overdue" to see if there were any tasks missed in the previous shift or week and resolve them as needed. **Reminder:** be sure to change them to their correct bin, and assign a follow up task if needed.
 - ☐ Continuing in the **Contacts** tab, go to the "Due Today" tab and complete any tasks remaining, following same instructions as above.
 - ☐ Ensure that with every opportunity, you move them in the **CRM pipeline** and move them to the correct stage(call 1, call 2, call 3, existing patient, new patient, etc), depending on their status, once their task has been resolved.
 - ☐ Once tasks for the day are completed, go to the opportunities tab on the side bar and ensure that the CRM is organized and up to date
 - ☐ Make sure that each patient is in their correct bin according to their status.
 - ☐ Make sure each patient that needs a follow up has a detailed task and note assigned to them, as well as a follow-up date and assignee.

3:00-4:00 PM

- ☐ Fold laundry (if there is any to fold)
- ☐ Make sure we have enough patient gifts and if not, get some more!
- ☐ Start cleaning quiet things:
 - ☐ Dust overhead lights and hallway shelf
 - ☐ Stock bathrooms with toilet paper and paper towels
 - ☐ Wipe mirrors down
 - ☐ Wipe down exercise room
 - ☐ Wipe down desks and chairs
 - ☐ Make sure inventory room is stocked and organized

4:00-5:00/5:30 PM



- ☐ Double check to see if all new patients for the next day have filled out their paperwork, and/or been sent the "Patient Reminder Text".
- ☐ Send any follow-up texts to new patients last week that morning shift might've missed
- ☐ Follow up with any messages, emails, or calls that have been coming through throughout the shift.
- ☐ Vacuum and spot mop once done with patients
- ☐ Restock both providers' rooms with towels, sheets, pillowcases, lube, gloves, etc.
- ☐ Check inventory sheet and make updates as needed
- ☐ Turn off lights, music
- ☐ Lock all doors