

## ***CSR Weekly & Daily To-Do List***

- Restock inventory and supplies
  - Batteries
  - Printer paper...all types
  - Printer ink and toner
  - Office supplies
  - Offices supplies for Audiologist
- Patient Care
  - Greet all patients when entering office
  - Answer phone
  - Inventory all forms for patient charts
  - Check patient charts for updates...pt contact information and insurance
  - Make up new charts for new patients
- Review with your Audiologist:
  - Clean and repair hearing aids
  - Check in repaired hearing aids and contact patients
  - Call to schedule appointments for new hearing aid fits
- Reports/Sycle
  - Print encounter forms
  - Print claims
  - Apply insurance claim payments
  - Input charges and receipts
  - Run all Sycle reports for office
  - Work up A/R and follow-up with insurance companies regarding claims submitted
- End of month reports:
  - Credit Card Transaction Monthly Report
  - Petty cash sheet
- Other:
  - Go to bank
  - Pick-up and clean office each day

# HCI Reference Manual

○