



### EOM report - Billing Manager

Send a completed form to Integrator at the end of each month.

Month/Year: \_\_\_\_\_

Report	Notes	Date Completed	Initials
<b>Beginning of Month</b>			
Met with all 3 insurance specialists to review goals and issues.			
On schedule with annual performance reviews			
Prepare for both clinics team meetings			
<b>Before End of Month</b>			
Oustanding claims - NKC			
Oustanding claims - LV			
Insurance Overpaid reports - NKC			
Insurance Overpaid reports - LV			
<b>Between 1st - 5th</b>			
Complete billing numbers for both clinics			
All statements mailed and text messages sent for patient AR			
All deposits posted into Open Dental			
<b>On or before the 5th</b>			
All Scorecard metric entered			
Review timecards and PTO for payroll x2			
All EOB's processed for previous month			
All DI payments posted to account	Days missed:		
Balance bank deposits to Open Dental			
<b>15th of Month begin</b>			
Collection calls			
Send collection accounts			
Call patient accounts with credits			