ALL ABOUT SPEECH & LANGUAGE

End of Month Checklist

To-do Item	Steps
Apply all charges	All charges need to be applied by the end of the same business day as the appointment.
Re-evaluations & Progress Notes	1. Review your caseload tab and change the appointment type for any upcoming progress notes or re-evaluations. Change the appointment type in RT accordingly (i.e. STREV, OTREV, PNST3, PNOT3, etc.). 2. For re-evaluations, you should be scheduling them 2 months out (see chart in re-evaluation procedure if needed). This ensures proper communication with Client Services. Notify Front Desk via email when the evaluation date is confirmed to ensure updated paperwork is sent out. 3. Edit the comment boxes of appointments leading up to re-evaluation to remind yourself to start commenting on the goal progress. 4. Front Desk will be monitoring Flex Clients for re-evaluation and progress note due dates.
Telehealth Client Updates	Notify your CM if there are any additional clients that are now a fit for Zoom to update this information in their chart.
Marketing/PCC	CM will assist you in any marketing efforts that are ongoing. Make sure you are in communication with PCC around Milestone Moments, Discharges, Theme Days, etc.!
Annual Goals	CM will ensure progress is being made toward annual goals and completion with set deadlines.
Caseload Tab	Ensure your caseload tab is up to date with your current clients.