

Front-Desk AI Readiness Checklist

Companion to "Five Checks Before You Add an AI Receptionist." Check a box only when you can show it is done.

Practice: _____

Date: _____

Completed by: _____

01 Map calls and requests

- ☐ Reviewed two weeks of call logs and voicemails for frequency and who handles each.
- ☐ Listed request types: new patient, reschedule, cancellation, insurance, billing, recall, urgent concern, other.
- ☐ Wrote down the one problem to solve.

02 Decide the AI's role per request

- ☐ Each request type marked: answer, capture, route, or support.
- ☐ Listed what the AI may say and collect.
- ☐ Urgent concerns always reach staff judgment; the AI never rates severity.
- ☐ Wrote what the AI says to out-of-role requests.

03 Verify every practice-software action

- ☐ Listed expected actions: read schedule, book, change, cancel, update record.
- ☐ Each action marked: verified in our live system, capture only, or unsupported.
- ☐ Tested for duplicates when changing a booking.
- ☐ Nothing promised to patients until marked verified.

04 Set the handoff when the AI stops

- ☐ Every request type has an owner, backup owner, and landing place.
- ☐ Response times set for office and after hours.
- ☐ Fallback set for AI or connected system outages.
- ☐ Caller told what happens next at every handoff.

05 Test real situations and review the chain

For each test, confirm all six: conversation, system action, routing, staff notification, privacy behavior, audit record.

- ☐ New-patient booking: pass/fail
- ☐ Appointment change: pass/fail
- ☐ Urgent concern: pass/fail
- ☐ Request the AI cannot understand: pass/fail
- ☐ After-hours message seen next morning: pass/fail
- ☐ Evidence on file for each test, not just a recording.
- ☐ Privacy and consent reviewed against what the AI collects and stores, including our obligations and vendor agreements.

Launch decision

Rule: Any missing owner, unverified system action, missing fallback, or failed critical test means Hold.

☐ **Ready:** All sections complete. Critical tests passed. Evidence on file.

☐ **Hold:** Any item open. Fix and retest before launch.

☐ **Not ready:** Problem, AI role, or software actions not defined. Return to Check 1.

Decision: _____

Signed: _____

Review date: _____