

Front desk

- Collect patient information (first and last name as it appears on their insurance card, dob, address, phone number, email address for patient portal)
- Verify spelling of patients name, address, email
- Create patients chart with **ACCURATE** information...BEFORE pushing save look over the information
- Get insurance card from patient- verify the ID # matches what has been entered in the insurance part of the chart. Also verify name in the patients chart matches what is on the card. Scan card into chart front and back once they bring it in.
- If a patient has Medicaid we need to have a healthy connection **BEFORE** patient is scheduled ...if patient has no PCP they need to call Medicaid and if they do have a PCP we need a healthy connection from them
- If patients PCP is closed then we can see them without a healthy connection, we need to ask who their PCP is and either call them or check online
- If patient is scheduling an annual we need to check when their last annual was and schedule after that date (If they have new insurance it shouldn't matter)
- Schedule patients appointment- note what the patient will be seeing the provider for.
- IF THE PATIENT IS IN THE LOBBY DO NOT ASK WHAT THEY ARE BEING SEEN FOR.
- Review appointment day and time with patient before ending the call
- Make sure patient knows where we are located

- Greet patients in a friendly tone as soon as they walk in the door. We want to treat our patients as we would want to be treated if that were you
- ALL NEW patients need to fill out the PTP and AUTHORIZATION TO CHARGE FORM (both of these need scanned into the patients chart)
- If a patient has medicare and they are scheduling an annual let them know we will need to collect \$120 when they come in for their appointment because medicare doesn't cover a full (breast and pelvic exam)womens annual
- Patient needs to fill out a GREEN CARD if they are here for their annual
- If patient wants to be called by a different name that needs to be put in the patients chart: on the practice management side it goes as a new alert. On the EHR side it goes in the patients chart as a chart alert. Make sure you change alert type to "practice alert" so everyone sees it
- When scheduling a patient ask if they have been in before; if so search by DOB and have the patient verify their name. This will help to avoid duplicating charts
- Use TEAMS to communicate with the nurses. Especially if you are the only one here there should always be someone at the desk.
- When you walk away from your computer don't leave any patient information up. Just minimize everything.
- When there are patients in the waiting room we cant say other patients full name or any identifying information about them (HIPAA)

DAILY

- Go over the schedule for the day get familiar with it, see what patients are new, what we need to collect from each patient, if there insurance hasn't been checked please

check it and note what needs collected from the patient, make sure you know which patients need to fill out a green card

- Check task and messages
- Check the FRONT OFFICE ADMIN chart for referrals
- If we get a referral....call the patient and get them scheduled
- Make sure waiting room is clean, vacuum if needed
- Check bathroom throughout the day
- Take the garbages out under both desks and the bathroom one if needed
- Check voicemails first thing in the morning, return calls that need a call back. Voicemails need checked throughout the day, before going to lunch and before going home for the day. Check both phones.
- At the end of the day print the payment receipt report and the No show (if we had any) put both in the drawer with the payment receipts
- Take care of the PATIENT PORTAL REQUESTS
- Take the shred papers back to the shred bin
- Check the fax machine
- Make sure both phones are on DND before leaving at night
- Unlock the front doors at 8 am
- Lock doors at 8 pm or when last patient has left

**When patients are here make sure we are being friendly and welcoming to everyone. Also when there are patients in the waiting room make sure you don't talk about other patients or mention them by full name or anything to identify them (HIPAA)