

RECEPTIONIST CHECKLIST - MORNING DUTIES

- ❑ Receptionist must be in office by 8:30 AM every morning, to complete morning duties. On MONDAYS receptionist must come in at 8:00AM to calibrate the ICAT machine. Refer to the ICAT manual for calibrating instructions.
- ❑ Once you come in disarm the alarm, open the panel and enter the morning code.
- ❑ Clock in.
- ❑ Make sure A/C is on, turn on all lights in office, turn on the ICAT machine, and unlock the front door.
- ❑ While in the lobby area walk around making sure that everything is neat and clean.
- ❑ Stock coffee bar if needed. For example bottled waters in fridge, water in Keurig machine, candy in bowl, coffee pods, sugar, creamers, etc... Make sure trash is empty. WATER PLANTS!
- ❑ Turn music on. There are two different remote controls. The big one is for the TV and the smaller one is for the Apple box, use this remote to open the Pandora app.
- ❑ Check voicemail box: either from the phone Dial *97 and enter the password or download messages from our email and listen to them. Be on the lookout for any possible cancellations and important messages. Make sure to write notes about calls to keep record if a call is to be returned. Return all missed calls immediately. If messages were intended for a certain staff, please make sure to write out on a "While You Were Out" note, and place in their box.
- ❑ Check email. Any CE Courses, receipts, important messages and invoices please print and place in the appropriate staff member's box. Jane our CPA has her own folder. Emails sent from our patient must be answered immediately, if you need time to look something up for them please let them know that you will be needing a few minutes, hours, or if you have an exact time as to when you will be having information for them. Same goes for phone calls. If you're not sure about something let them know that they will be place on a brief hold or that you will need to call them back.
- ❑ Call any patients that have not confirmed their appointments for the day.
- ❑ Place battery back in the camera that is located under the left monitor on the front desk. Battery should be charging in the consult room on the right wall outlet.
- ❑ Prepare for the morning huddle; get as much information from appointments in order to provide information to our team. Print out copies of the schedule for the day. Some important notes that you can be writing on your schedule are, patient needs picture, patient needs consents signed, any information need to be updated(health history , medications, address, phone number, etc....), patient needs to fill out new patient paperwork.
- ❑ Gather the whole team by 8:45AM for morning huddle.
- ❑ Tip: Having a TO-DO list is very helpful!
- ❑ Call patients for the following day to confirm appointments, and also confirm any lunch & learns, appointed calls.
- ❑ Case Calls: Make sure cases have been received /approved on case manager in order to continue onto calling patient in for appointment. Make notes in office journal for each patient, all calls must be recorded even if you just left a voicemail.