

FRONT OFFICE TRAINING SCHEDULE

NAME _____ POSITION RECEPTIONIST TRAINER _____ PHASE START DATE _____

DATES OF PHASES: Phase 1 Week 1 Phase 2 Week 2 Phase 3 Week 3&4 Phase 4 60 DAYS Phase 5 90 DAYS

RATING SYSTEM (1) does not meet expectations (2) partially meets expectations (3) fully meets expectations (4) exceeds expectations (NT) not taught yet

TASK or PROCEDURE	PHASE 1					PHASE 2					PHASE 3					PHASE 4					PHASE 5				
	1 st week					30 days					60 days					90 days									
	1	2	3	4	N	1	2	3	4	N	1	2	3	4	N	1	2	3	4	N	1	2	3	4	N
EXPECTATIONS: 1 = does not meet, 2 = partially meets 3 = fully meets 4 = exceeds, N = not trained yet																									
PERFORMANCE STANDARDS (ALL PHASES)																									
come with a great smile and attitude																									
consistent in performing all tasks																									
multi-task to manage multiple priorities																									
appropriately prioritizes tasks																									
looks for ways to assist other team members																									
uses tact and discretion in all discussions																									
listens to and responds professionally to feedback																									
receptive to training																									
maintains confidentiality in all matters																									
avoids all forms of gossip																									
serves patients with kindness and empathy																									
follows conflict resolution guidelines																									
PHASE 1																									
checks in patients																									
acknowledges patients as they enter																									
manages patients in the reception area																									
accurately assembles charts																									
puts charts up in three minutes																									
answers the telephone by the third ring																									
takes accurate phone messages by using the memo system																									
manages multiple phone lines with minimal hold																									
schedules consultations accordingly to dr.'s guidelines																									
enters patient and appt information in computer																									

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EXPECTATIONS: 1= does not meet, 2 = partially meets 3= fully meets 4 =exceeds, N = not trained yet																									
PHASE 1 (continued)																									
coordinates with referring offices																									
general understanding of filing system																									
pulls/files charts																									
prepares charts/understands assembly order																									
keeps work area clean and uncluttered																									
housekeeping: trash, vacuums, check bathroom																									
maintains quick call list																									
learns to triage phone calls																									
chart documentation																									
confirms appointments																									
collects money and posts payments																									
locates missing charts																									
cleans reception area																									
PHASE 2																									
Continue/improve tasks from phase 1																									
Post treatment charges																									
Processes credit card payments																									
PHASE 3																									
continue/improve tasks from phases 1 & 2																									
observes consultations, surgeries, post-ops																									
manages patient flow with back office																									
monitors and maintains workable schedule																									
notifies back office of changes within 5 minutes																									

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PHASE 3 (continued)																									
calls in prescriptions when received from clinical staff																									
schedules patients with other specialists																									
takes simple accounts calls																									
prepares dazbles cards																									
PHASE 4																									
continue/improve tasks from phases 1, 2, & 3																									
works front desk with minimal supervision																									
balances end of day																									
prepares bank deposit																									
PHASE 5																									
continue/improve tasks from phases 1, 2, 3, & 4																									
works front desk independently																									
PHASE 6- After 90 days																									
opens and closes office																									
retrieves messages from answering service																									
handles difficult patient situations																									
understands patient accounts																									
CROSS TRAINING TASKS																									
checks out patients																									
makes financial arrangements																									
presents treatment plans																									
send referral letters																									

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CROSS TRAINING TASKS (continued)																									
opens mail																									
posts insurance payments																									
insurance eligibility																									
prepares preauthorization																									
prints x-rays																									
maintains outgoing mail																									
follows up on treatment pending / recall reports																									
schedules appointments and cancels appointments																									
OTHER ITEMS																									
make coffee																									
back-ups																									
closes visa/mc machine																									
office supplies																									
prepares for morning huddle																									
sending to collection agency																									
operate fax/copy/postage meter																									
morning computer start up																									
print insurance labels																									
deleting a patient from computer (dead file)																									
prints a statement																									
paper records handling and storage																									
turning down computers																									
set alarm/security system																									
prints and prepares insurance forms																									

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OTHER ITEMS (continued)																									
check pending claims																									
predetermination- patient notification																									
replenish petty cash																									
sets up recalls and schedules appointment																									
generate recall report																									
calls recalls from recall reports																									
mails out recall cards																									
maintain post dated check box																									