

Receptionist Duties 'How To' Checklist

EMPLOYEE NAME: _____

Initials and date of trainer – signed once it has been observed that the task can be done acceptably.

(Anyone can train on any topic however the ones for Office Manager only to sign off need to be double-checked /reviewed with Office Manager).

- _____ Answers phone correctly
- _____ Can place a call on hold/transfer, etc.
- _____ Knows how to take a great message * (only Office Manager can sign off)
- _____ Handles new patient questions * (only Office Manager can sign off)
- _____ Able to check for new patient paperwork and print from office forms
- _____ Comprehends how to print medical history update
- _____ Understands how to print insurance benefit breakdown
- _____ Knows how to enter basic information into patient info screen, such as address
- _____ Able to break and/or move an appointment * (only Office Manager can sign off)
- _____ Can explain process of new patient paperwork, etc. * (only Office Manager can sign off)
- _____ Knows where to enter new patients that call/schedule on the list for tracking
- _____ Understands how to scan in documents and import them into patients chart
- _____ Able to change set next arrival indicator and what they mean
- _____ Knows how to watch the schedule and call when patients are late
- _____ Understands how to handle last minute cancellations/no show * (only Office Manager can sign off)
- _____ Comprehends who gets different faxes, mail, etc. * (only Office Manager can sign off)
- _____ Knows where office supplies go when delivered and what to do when running low
- _____ Has a good command on how to confirm appointments * (only Office Manager can sign off)
- _____ Can show how to send x-rays from chart