

Front Desk Check Out

Hours: 7:30am-5:30pm

Opening Duties:

1. Please turn on computer
 2. Check both bathrooms make sure they are stocked
 3. Put away specialty test
 4. Make sure to purge the specialty test
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1. Checking Patient Out
 - a. Print completed Patient Care Plan
 - b. Review the Patient Care Plan with the patient
 - c. Highlight
 - i. New added on supplement and medications
 - ii. Next Follow up
 - iii. Future Lab orders or specialty labs
 - iv. Imaging orders
 - d. Make sure patient understands how to take the supplements and medications and how long they should be taking them for
 - i. If a patient is on a long term supplement like daily reset pack please see if they want to be on the autoship program
 - e. If patient needs lab order or imaging please make sure to fill it out and fax to appropriate facilities . Please make sure to scan the orders and give the patient the hard copy.
 - f. If patient is recommended any specialty test please make sure the patient understands how to complete the test.
 - i. Please make sure the specialty test requisition forms are completely filled out
 - ii. Then highlight the area that the patient will need to fill in Examples of specialty req forms in IH Master
 - g. Make sure the patient knows the next step
 - i. This can be a follow up in office in 6 months
 - ii. Can be labs in 2 months and then a follow up when the labs are in
 - iii. This can be 1st follow up when all specialty test are in
 - h. Please make sure to schedule the patient for future appointment while they are standing to check out
 - i. If the patient does not schedule for the follow with the doctor or labs please make sure to put them on the reminder list.
 - i. [Reminder List](#) directions
 - j. Please ask the patient if they have any additional questions

- k. When entering invoices into quickbooks please make sure to have the correct physician name in the appropriate area. This is how the physicians get paid.
 - l. Make sure to run the credit card (or cash, check) for the total due
 - i. We collect all fees due at the time of check out
 - ii. There are no exceptions patient must pay
 - 1. If a patient is unable to pay due to some circumstance please tell the patient to contact us today and pay over the phone
 - 2. If the patient does not call that day please call the patient at the end of the day to collect payment
 - 3. If the patient does not answer when you call please put the invoice in a folder titled call on Friday
 - 4. Please call the patient on Friday to collect payment
 - 5. If the patient does not answer or return the call by Monday please put a hold on there account. This needs to be done in practice fusion and quickbooks
 - a. In practice fusion/quickbooks under the first name please enter in OB for open balance. This allows staff to know that in order to schedule the patient they must pay the open balance bill
 - 6. Patient is not to take home any supplements if they are unable to pay. We can ship them to after we receive payment
 - m. Please always check to see if a patient has a balance. Please collect the balance at that time. Please don't let it sit in the account with no information
 - n. Please ask the patient if they have any questions before they leave the office
 - i. If they have questions please send to the appropriate doctor
 - o. Please make sure to send the patient home with everything they purchased
 - p. Please make sure to send them home with Patient Care Sheet, Invoice and additional information they may need
2. Please help checking Patient In
 3. Answer Phones
 - a. Keep in mind "YES WE CAN HELP"
 - b. Make sure all message for the doctor from the patient go to the appropriate MA . Please make sure to include the initials of the doctor at the bottom of the message before the message is sent.
 - c. When taking questions from the patient please make sure you get detailed information. Example pharmacy name and number, all detailed symptoms that apply to the question.
 - d. Be aware of what is currently being tracked on the phone logs The phone logs are turned in at the end of each week.
 4. Emailing Patients
 - a. When emailing patient please make sure all information is put into practice fusion that is emailed back and forth
 - b. Please respond to email with in 24 hrs

Closing Duties:

1. Make sure all Practice Fusion message are answered
2. Please make sure deposit is finished
3. Make sure cash drawer is put away
4. Turn computer off
5. Make sure blinds are closed
6. Please make sure the alarm is turned on

Scan filled in specialty req forms into IH Master