

# FRONT OFFICE *Rocks*®

## The Leader in Dental Front Office Solutions & Training

### Front Desk Opening Policy

Each day we need to make sure we get certain things complete to open the office efficiently and at the end of the day to make sure we close the office correctly. The following is an itemized list of steps to take by the first person in from the front office team in the morning. These responsibilities can be delegated to other front office employees; however, it is the first person of the day's responsibility to make sure it was completed correctly.

#### Turn Off The Alarm

- If you are the first employee to enter the office, the alarm will be activated and you must turn it off within 60 seconds. This can be done by entering your code into the alarm key pad.

#### Forward and Unforward Phones

- The phones are to be forwarded to doctor's cell phone when no one is available to answer phones in the office. They are to be removed from forward as soon as someone arrives to the office that can answer them.

#### Unlock office

- Once you have turned off the alarm and unforwarded the phones, take the lock off the front door.

#### Open Email

- Check the email first thing in the morning to check for anyone that is requesting to move, cancel or make an appointment. This should be done first thing so that you can address anything that is a priority for the day.

#### Check for New Patient Paperwork

- Open the website to check for new patient paperwork that we might have received from new patients over night. If there is new patient paperwork sent - make it a priority to have it either printed or entered into the software as soon as someone has time. Also make sure to make it a priority to have someone verify insurance in the AM if the patient is coming in today .

#### Open RevenueWell

- Go to the main page of RevenueWell to check for any appointment requests or cancellations.

#### Double Check Phones for Messages

- Even though phones are forwarded at the end of the night to the doctor, sometimes people will return a call to one of our other phone lines. Double check phone to make sure voice mail is not blinking and if it is, retrieve the message right away.

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### **Print Today's Schedule for Huddle**

- If today's schedule is not printed for huddle yet, print enough copies for each person working and bring to morning huddle
- Bring also to morning huddle yesterdays numbers on the morning huddle sheet.

### **Be Ready With Medical History Updates and New Patient Paperwork**

- Make sure you are ready with the medical history updates that need to be done today as well as new patient paperwork.
- Verify if insurance has been called on all new patients that have insurance and paperwork has been completed prior to their arrival.

### **Coffee Area**

- When arriving in the morning, verify that the coffee pot is turned on in reception area
- Stock the coffee area and make sure water container is filled on coffee pot
- Stock the coffee supplies and the water cups
- If the water jug is constantly beeping, it is time to change the water jug underneath. You can do this by opening a new water jug nearby, unscrewing the hose thingie from the machine and screwing it on the new jug of water. This also needs to be done at any point during the day when it starts beeping to let us know it is empty.

### **Reception Area**

- When arriving make sure the reception area is picked up and neat , run a vacuum if needed or pick up
- Make sure counters look good, pens, business cards stocked, etc...
- Anytime a patient/doctor leaves coffee mugs, take to kitchen

### **Kitchen**

- First thing in the morning, empty the clean dishes from the dishwasher
- Get any dishes around office into dishwasher when running it and when done, put dishes away
- At end of day make sure all dishes are in dishwasher and counter/table cleaned and start dishwasher
- This can be delegated to other employees, such as a dental assistant if they have time in their schedule but you must make sure it is done prior to lunch rush to kitchen when dishes start to pile back up.

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### Huddle

- Be ready with information for huddle
- Watch clock and suggest to doctor to start huddle if they haven't at least 20 minutes prior to the first patient arrival
- Take notes for the other front office staff on their huddle forms (refer to huddle policy)