

Front Desk Zone Onboarding & Reboarding Worksheet

		7-10 times	7-10 times	90 days	<u>Staying on the Tasks</u>
Top Priorities that CANNOT wait		How many times have you observed this task?	How many times have you performed this task with supervision?	How long has this been on your checklist?	
	Checking in patients and greeting them by name				<ol style="list-style-type: none"> 1. Use personal daily google calendar with tasks entered for each day- <ol style="list-style-type: none"> a. Print the whole week's personal schedule at start of the week to see the overview of the whole week's tasks 2. After PRES the daily schedule write names of people to address with on your own personal schedule 3. Enter alerts in software for those that have items that need to be addressed 4. Use a physical notepad for questions or concerns to address between doctor and various CA zones and bring that notepad to weekly O3 meetings 5. Mark off items completed in notepad to reduce extra verbal communication <p>*NP Scheduling can wait if anyone else on the team can schedule NPs, other than that, schedule on <u>paper</u> and don't worry about software</p>
	Educating and referrals				
	Calls to late patients (within 8 minutes)				
	Answering phones				
	OTC payments collected				
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Priorities that can wait if need be		How many times have you observed this task?	How many times have you performed this task with supervision?	How long has this been on your checklist?	
	Confirming frequency and next appointment				
	NP Schedules				
	Scheduling and rescheduling in software				