



Front Desk Checklist

Here's a list of the daily activities we do to keep things running smoothly.

Daily Start Up

- Review to do list made the previous day.
- Review schedule for the day and print out face sheets for appts.
- Add appropriate charge tickets to face sheets for patients paying OV fees at check out except HAD/O appts (this paperwork is already prepped and with HAs.
- Make note of who (patients coming in that day) will need to update paperwork and insurance information.
- Ship out any boxes/shipping bags that are on the back counter behind the desk (before 10:00a).
- Remind Au.D. to put rechargeable hearing aids in charger if HAD/O scheduled for p.m.

During the Day

- Do tasks on to-do list.
- Do reminder calls for appts scheduled for the following days.
- Monitor schedule for cancellations and go to waitlist to call patients with FCCs (1st priority) and/or HAD/O (2nd priority) appts that are the furthest out in the schedule.
- When a patient arrives for a routine HACK appt, obtain the patient's hearing aids for servicing in the lab so that the hearing aids can be cleaned before seeing an audiologist.
- Put drop offs in the lab and make sure the patient understands that it will be 24-36 hours before they will get back to them re: status of hearing aids.
- As soon as an FCC is scheduled, verify insurance benefits for any hearing aid coverage for that patient. If the FCC is scheduled as a new patient, obtain insurance information on the phone, if possible, so that this info can be obtained and available at the time of the appt.

- Check in (online hearing aid notebook and BP) rec'd shipping when it arrives, scan invoices and then put the boxes and invoices in the lab for processing.
- Prep supply orders taken by phone and are ready for pick up or shipping (if requested by the patient).
- Take messages for Au.D.
- Assist Au.D. in any paperwork tasks as requested/directed.
- Do check up calls on patients that were fitted with new hearing aids within the last week. Alert Au.D. of any concerns expressed by the patient.

End of the Day

- Review schedule. Make a to-do list for the next day.
- Remind Au.D. to put rechargeable hearing aids in the charger for charging overnight for HAD/O if scheduled for the next day a.m.
- Look ahead in schedule and double check HAs are in for upcoming fitting appts or HADR appts (delivery repaired hearing aids).

Personal Goals

- Daily*
 - What are the 3 most important things for you to complete today? (only 3) do you have scheduled time to work on them?
 - Is the schedule full for each provider or do you need to start pulling people from the waiting list first thing?
 - Are you limiting 3rd party appointments each week to make room for private pay patients?
 - Do you have slots set aside for New Patients or Revenue producing appointments?
 - Are you using the wait list when patients complain about a wait time?
 - Did you use the wait list to move up appointments after a cancellation?
 - Did you check the lead center for missed or abandoned calls?

- Did you check the lead center for text messages that need to be answered?
- Did you check the lead center for form fills that need to be answered?
- Weekly**
 - What are your 3 most important things for you to complete this week? Did you schedule time to work on them?
 - Review MVAs - how was time spent? What can be improved?
 - Review MOSs - how'd you do?
 - 100% responsibility - did you blame or complain or focus on solutions?
 - How many reviews did you generate this week? (log into ORB)
 - How many new patients were scheduled for the week?
 - How many new patient calls were NOT scheduled and why?
- Monthly**
- Quarterly**
- Annually**