

## Front Desk Opportunity

### 1. Attendance:

- Adhere to the work schedule. Report to work shifts in a dependable and timely fashion to minimize the interruption or delay of regular work output for the clinic.
- Occasionally work outside of normal office hours as patient volume or staff absences make necessary to operate efficiently, meet heavy demand, and accommodate schedules and patient needs.
- Flexibility of work schedule to accommodate special projects, clinic staffing needs, or other circumstances that require work hours that deviate from the normal, routine schedule.

### 2. Facilitate friendly professional introduction to our practice

- Book appointments using proper procedures
- Ensure patients fill out and return either online or in office the "New Patient" forms
- Keep the reception area in proper order
- Inform optometric technicians of patients ready to be seen
- Answer phones and assist patients as needed
- Work with doctor to develop phone scripts for phone shopper conversion and consistent practice information communication
- Greet and direct patients to proper areas
- Inform optician/ contact lens technician of patients
- Prepare correspondence
- Biweekly: Prepare "Thank You" notes to patients for referrals

### 3. Patient Maintenance by efficient check-out, recall and referrals

- Review fee schedule and payment with patient
- Schedule appointments for next exam or pre-appoint
- Keep Doctor referral system up to date
- Monthly: Mail returned recall cards and update patient's addresses in OfficeMate
- Maintain procedures for annual recall
- Maintain procedures for Patient Reactivation (for patients not seen in last 3 years. DemandForce has templates for "reactivation")
- Contact patients, who "No Show" or "Cancel", to reschedule:
  - Contact Schedule:
    - a. **Call or Text within 1 hour** of "No Show"
    - b. If no response, **Text @ 1 week**
    - c. If no response, **Text @ 1 month** after missed appointment
- Complete and update patient files in OfficeMate
- Ensuring that family members are linked in OfficeMate
- Backup other staff in verifying and authorizing Medical Insurances

#### **4. Enhance practice profitability by patient collections and sales**

- Collect patient fees at time of service.
- Offer the opportunity and benefit of our services and products to patients, in person and via the phone and email
- Educate perspective patients who call requesting fees for services/eyewear/ contact lenses/payment options (Effectively manage Phone Shoppers)
- Present Contact Lens “Annual Supply Offer” and Rebates to patients
- Compile and balance Deposit Ticket and Cash Drawer at the end of day
- Backup for compiling and reconciling Daily Reports at the end of day.

#### **5. Overall Practice Care**

- Sort/ deliver mail to appropriate staff member or the doctor
- Keep track of # of new patients each month and report at Staff Meetings  
(Use OfficeMate reports vs. Daily log document- determine which is most efficient)
- Oversee any adjustments/ changes to OfficeMate (Practice Management) preferences
- Oversee front office and reception area appearance and cleanliness
- Inventory/ maintain front office supplies, forms, brochures/ handouts
- Oversee verification of next day’s appointment
- Work with Practice Manager in developing Front Desk procedures; including arrangement of documents on public folder for all staff to access

#### **6. Be a Cooperative Team Member**

- Adhere to and maintain Professionalism standards*
- Assist other team members as needed to care for our patients
- Complete other duties and projects as assigned

#### **Job Specifications:**

- Minimum education: High School diploma or equivalent
- Minimum skills: computer skills including word processing; General math skills; ability to multitask; professional and friendly phone etiquette
- Experience: previous experience with front desk and administrative responsibilities.
- Personality attributes: personable, trustworthy, eager to learn, organized, detail-oriented, and maintains a professional attitude and appearance
- Physical attributes: be able to use hands to finger, handle, or feel. The employee is frequently required to stand, walk, and sit. The employee must frequently lift and/or move up to 10 pounds and occasionally lift and/or move up to 25 pounds and to position patients into equipment and exam chair efficiently and effectively. Specific vision abilities required by this job include close vision, color vision, peripheral vision, depth perception, and ability to adjust focus.