

Front Office SOP



MORNING TASKS: Preparing for the Day



Arrive Early

- Arrive at least: 15 minutes before opening
- Review any overnight notifications



Prepare Reception & Bathroom Area

- Arrange chairs neatly
- Wipe down surfaces
- Restock brochures and intake forms
- Check restroom cleanliness and supplies



Set Up Reception Desk

- Organize appointment cards and daily paperwork
- Keep pen, notepad, and phone directory available
- Secure any confidential documents



Turn On Equipment

- Lights
- Computers
- Printers
- Phones
- EHR/PM system
- Confirm all systems are functioning properly



Great patient care begins with great preparation.”



Front Office SOP



MORNING TASKS: Preparing for the Day



Review Appointment Schedule

- Log into scheduling software

Review:

- Patient names
- Appointment type (90834, 90791, etc.)
- New vs. established
- Special requirements
- Confirm charts are prepared (prepared the day before)



Confirm Paperwork

- Print:
 - New patient intake packets
 - Follow-up questionnaires
 - Insurance verification sheets
- Ensure all required documents are ready



“Start the day by being prepared for the needs of your patients.”



Front Office SOP



MORNING ACTION ITEMS



Check Voicemail, EHR Tasks & Emails

- PRIORITY: Address URGENT items first**
- Return patient calls
- Schedule/reschedule appointments
- Cancel appointments
- Task all calls in EHR to yourself or appropriate staff
- Send Rx refill requests to providers
- Submit new patient appointment requests for approval
- Document ALL communications in patient chart



Be present, friendly, and proactive.



IMPORTANT:

- ALWAYS input notes and CLOSE tasks in EHR
- Add all patient email requests into EHR
- Route tasks appropriately
- Rx requests
- Lab updates



A warm welcome starts every visit on a positive note.



Front Office SOP



MORNING ACTION ITEMS



Greet Patients

- Welcome patients warmly
- Check patient in
- Verify:
 - Name
 - DOB
 - Insurance
 - Demographics
 - Collect copay (if applicable)
 - Check vitals (if applicable)
 - Provide required forms

Be present, friendly, and proactive.



Update Staff

- Inform providers of:
 - Schedule changes
 - Urgent messages
 - Patient emergencies
 - Rx requests
 - Lab updates



A warm welcome starts every visit on a positive note.



Front Office SOP



MIDDAY TASKS



Continue checking voicemails & faxes

- Return all patient calls
- Send Rx requests through EHR
- Ensure charts are prepared for next day
- Confirm intake/consent paperwork is complete and uploaded
- Call patients who have not completed required forms



If paperwork must be done in office:

Patient must arrive 30 minutes prior

Otherwise, appointment must be rescheduled



Lab Reports

- Upload all lab reports before appointments
- If no results:
 - Call lab to confirm completion
 - Request fax
 - If not received → CALL AGAIN



Insurance Verification

- Confirm active insurance on file
- Mark clearly if Self-Pay
- Verify coverage for CPT codes scheduled

“Double-check all entries to ensure no task is overlooked.”



Front Office SOP



END OF DAY TASKS



Clean & Sanitize

- Sweep floors
- Wipe surfaces
- Check restroom
- Take out trash daily
- Remove clutter
- Sanitize high-touch areas



Secure Financials & PHI

- Lock up checks/cash
- Balance money log
- Lock all confidential documents
- Shred unnecessary documents



REMEMBER: Do NOT leave documents with PHI out
Keep desk tidy



Supplies & Inventory

- Check stock:
 - Forms
 - Paper
 - Toner
 - Pens
 - Brochures



“Leave the office ready for a fresh start tomorrow.”



Front Office SOP



Phone Etiquette & HIPAA Compliance

When answering the phone:

- Greet professionally
- Verify 2 patient identifiers:
 - Full Name
 - Date of Birth
- Speak discreetly
- Never disclose PHI without verification



NOTES:



"Protect patient information with every call."



Front Office SOP

DAILY REMINDERS

- All voicemails addressed
- All tasks documented and closed
- Charts ready for next day
- Insurance verified
- Labs uploaded
- Office clean and secure
- PHI protected



Review daily reminders to ensure thorough and compassionate care.