**POLICY/PROTOCOL LUNCH BREAKS/CHECK OUT CLOSURE/”CLOSING A**

**CHECKOUT**

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**From:** Jerry Orloff

**Sent:** Monday, April 09, 2012 4:09 PM  
**To** Front Office Staff – Melbourne

The policy below will help provide you with some guidance on how to achieve the goal of providing better customer service.

1. **Concentration of effort**: first thing in the morning there are no patients to check out, and thus all desk staff should be checking in patients. Likewise at the end of the day when there are no patients left to check-in, everyone should be helping the check out staff check patients out. In order for this to be effective, all staff need to be cross-trained. Our patients will benefit from such a united effort of purpose.

Be certain to COLLECT on patient balances. Always collect on REFRACTIONS, except TRICARE PRIME. Always collect those amounts noted for contact lens related charges at check out.

**At the time of check in, take careful note of patient balances.  Collect these prior to placing the patients chart up to be worked up.  If the patient has multiple questions, contact the billing department for assistance.**

Some of you may believe that the front desk and the billing department are separate departments with completely separate functions. This is not correct. In order for the Practice to operate efficiently, the reception desk (check in and check out) must work in concert with the billing department. It is my absolute expectation going forward that demographics will be checked each time each patient has visited our office and it has been at least one month since their last visit.

Do not simply ask the patient "do you still live at 123 Main Street and is your phone number still 7224443?"  (We are conditioned that most people want to hear "Yes" most of the time in response to questions.  This is how to please people.  Thus, "Yes" is likely to be the answer that you will receive if the question is posed this way, even if the statement is incorrect).

Instead, ask the patient, "Sir or ma'am, can you please tell me your street address?  Can you tell me your telephone number?  May I see all of your health insurance cards, please?"

It also comes to our attention that we are not routinely getting photo IDs.  It is absolutely essential that we obtain these.  Going forward ask each patient for his or her photo identification, i.e. drivers' license.  If a patient hesitates or has concerns as to why you're asking for it, simply explain that it relates to the HIPPA rules, and it helps us to protect the patient's identity, and to better serve them.

To note that you have verified demographics....

By working together to ensure accurate demographics, the Practice is much more likely to receive payments for the services that we provide in a timely manner.  It is through these payments that all of us, in turn, receive our pay.

**2. The closing of checkouts** while we are still seeing patients is not something we desire. The only time that this would be appropriate is if no physicians are scheduled in the other hallway or if they have finished early for the day and no other physician is using the area. That's rare in our practice. Going forward, do not close a check out without administrative approval.

**3  All lunch breaks at the front desk are to be staggered lunch breaks** (meaning that multiple staff are not to be on lunch simultaneously).  Lunch breaks should generally be 45 minutes long.  If you have any special needs such as the need for an earlier lunch or a later lunch, please let us know and we will do our best to accommodate you.  I am tasking the front office lead with the duty of scheduling specific lunch times for each staff member.   Once assigned, the lunch schedules are to be followed.  It is each staff member's personal responsibility to go to lunch and return from lunch in a timely manner relative to the schedule.  (Inform your supervisor and Eileen when you are leaving for lunch - taking care to ensure that the person scheduled for lunch ahead of you has returned prior to your leaving for lunch). The lunch schedule is to be followed as provided to you.

(Multiple staff leaving the front desk area while patients are still checking in or out hurts our ability to effectively serve our patients).