**PARTNERS FOR HEALING**

**FRONT DESK/RECEPTION**

**Procedures for Start of the Day/During the Day**:

* Arrive by 7:45 am; Disarm Alarm

• Clock-in.

• Turn on lights

• Turn on computer and mouse. Login password is Partners3!

• Log into AthenaNet on Google Chrome.

• Check for after-hours VM messages; forward message for appropriate response/action.

• Delete messages off the phone once you have written them down.

• Turn phone on at 8:00am. (DND > 1 > Hold)

• Log in to info@partnersforhealing.org on Outlook and check for any new applications. Password is on pullout drawer under computer.

• During the day when calls come in, route them to the appropriate extension.

• Do not answer the phone if someone is at your counter. There should be phone backup to answer. If not, answer and put caller on hold while you finish with the patient at the counter.

• Fax cover sheets are on clipboard on filing cabinet.

• Periodically make sure you are checking the clinical inbox to keep it cleared out, both the Tullahoma Staff and your own. Specifically, junk faxes or information pertaining to people who are not patients at PFH will appear and need to be deleted. Under action note, say either “marketing” or “not a patient at PFH” before deleting under “view actions”. Providers may also send you patient cases to your inbox on Athena if a patient’s records are needed from an ER or other physician’s office. The front desk is responsible for requesting these records from the hospital or doctor’s office . Have the patient’s name and DOB on hand. If a medical release form is requested, print from patient’s chart (page 2 of New patient packet/annual paperwork) and fax to appropriate office.

• When mail comes, check outgoing mail basket next to front desk printer and give to mailperson. Take incoming mail to Director. If any packages containing medication comes in, notify nursing staff and place at nurses’ station.

**At Check In**:

• “Calendar” tab in top left corner of screen > “Today’s Appointments”. The whole day’s schedule will appear on the left side of the screen. Sign the patient in by clicking on their name. At bottom of screen, click “Start Check-In”. On the next screen, click on “Done with Check-In” in the same location on the screen. If patient is checked in by mistake, click “Cancel Check-in” instead of “Done”. Once patient is successfully checked in, their name on schedule will be highlighted yellow and a number 2 will be displayed next to their name.

o Sometimes Athena will not let you continue because a patient’s signature on file has expired. In this case, move the expiration to a year from date of visit. You should be able to proceed checking the patient in once this is reconciled.

• Alert one of the nurses that the patient is waiting in their car and has been checked in.

• If it is an established patient, check chart to see if they have filled out an Info Verification form (within the last 6 months; if not, Quickview of Patient’s profile > Clinicals > Print Forms > Patient Information Form (established patients)-2nd option); or Annual Packet (within the last year; if not, Quickview of Patient’s profile > Clinicals > Print Forms > New Patient/Annual Packet - 1st option);. If not, when patient is in the building, give patient their Info Verification form to review for any changes Make sure they sign the form (even if no changes were made). This does not need to be done every visit.

• Look to see Lab/Ultrasound/Mammogram appointment “rendering” are flipped to the Provider at check-in.

• Go to “Chart” under Admin and see if the patient has:

Patient Info Verification Packet New/Annual dated 2020 \*\*All patients\*\* (NP fill this out at 1st Appt)

Income dated from previous year (i.e. 2019 in 2020; 2020 in 2021, etc)

Make sure all information is complete on the Quickview screen Address

If patient does not have annual paperwork, print out packet for them to fill out. If patient does not have other eligibility documents, notify patient to bring them in at next appointment.

**Phone (20 minutes) Appointment**:

• If patient arrives to clinic but is scheduled for phone appointment, at check in, you can switch appointment type from “Phone” to “Established”. On the schedule, in-person established (20 min) appointments have “ep20” and phone appointments have “ph20”.

• Patient is expected to call us first, just as if they were to show up to an appointment in person. If provider is available and not on the phone or with another patient, check to make sure provider is at their desk and transfer call to them by pressing “Trans” (first button on top left of phone” and push button to the right of the extension line you are wanting to transfer to (ex. Faith- 106). Button will flash red until provider picks up and will be solid red.

• If patient calls for phone appointment but provider is unavailable, check them in on Athena, verify patient’s phone number, and let them know the provider will call them in a few minutes.

• Let provider know that the patient has called and is checked in.

• Before checking patient out, verify that the provider was able to contact patient and appointment was filled.

**New Patient (60 minutes) Appointment**:

• Check in procedure same as all other clinics. Print out New Patient Packet (Quickview > Clinicals > Print Forms > New Patient Packet- 1st Option). Before patient leaves, verify all places to initial/sign have been and you sign on the witness line on the “Medical Release” form before scanning into Athena.

• **If the new patient is a female, have her fill out the TBCSP consent form for her to have Well Woman and Mammogram appointments**.

• If window pops up about adding insurance policy, click “Add Primary Insurance”, then select “Self-Pay” and save.

**Labs:**

• Try to fill up the lab schedule’s earlier appointments first (before 9AM) before filling in the later appointments.

• Make sure patient has current lab orders in chart (within the last 3 months) and print next day’s lab orders at the end of day. If patient does not have lab orders, notify Faith so she can submit them in Athena.

• **If patient is here for labs, check-in is same, except switch “Rendering Provider” to from “Labs” to “Faith LeGrone”. If not done, patient’s name will be highlighted on schedule in dark yellow- needs to be a light yellow. The check-in screen should look like this:**

**Appt type Labs (10 mins) Dept. Tullahoma**

**Scheduling provider Labs Rendering Faith\_LeGrone**

**Mental Health Med with Heather on Wednesdays**:

• Mental Med New Pt (60 minutes) and Mental Med (20 minutes) appointments are on Monday.

• Check patient in per usual and have them wait in lobby.

• Let FNP know patient is waiting.

**Mental Health Thursdays:**

• Call Kitty at 931-455-3634 on the Wednesday before to let her know if her schedule is different so she knows when to come.

• Mental Health (30 minutes) are on Thursday mornings with Kitty Shapard.

• Print her schedule and put in her green folder

• Print out a mental health consult for each patient (Patient profile > Clinicals > Prints Forms > ”Mental Health Consult Form”).

• Scan in the completed mental health consult forms after session is completed. It will scan to patient’s chart automatically because it has a barcode

**Well Woman**

• TBCSP consent forms must have been filled out within a year of appointment. If a year has passed since she filled it out, they will need to fill out a new one to be current.

• For TBCSP forms: Admin- Signed Forms & Letters > Breast and Cervical Program

o • Call PathGroup before close to let them know about specimen pick up (615-562-9300 Account #: 360733)

**Ultrasound Day (2nd Saturday monthly):**

• Print off a schedule and place in Room 3.

• Technician will leave a copy of the reports.

**Mammogram Bus Day:**

• ~~Email Kelly Large, kelly.large@ascension.org (Phone 615-284-6266)with a list of scheduled patients 2-3 days before, if Director has not already done so.~~

• Have all women fill out the Demographic and Breast Health form (provided by St. Thomas). Make sure the patient has a TBCSP consent form filled out, either on day of, or it is already in her chart.

• TBCSP forms must have been filled out within a year of appointment. If a year has passed since she filled it out, she will need to fill out a new one to be current.

• Mammograms are scheduled when the St. Thomas bus comes. This date will vary. Director will notify front desk of this date when it becomes available.

**At Check Out:**

• On Today’s Appointments, click on patient’s name. It should be Green at this point with a 2. Click “Start Check Out”. Scroll to “Mark Appointment as Not Requiring Charge Entry”  Click on box with the number 2 beside it and choose “Other” on dropdown menu. Then click on “Done with Checkout” at bottom of screen. On the schedule, if successfully checked out, the patient’s name will longer be highlighted and a 4 will be displayed. If name is green/blue with a 2 or 3, patient is not checked out completely.

• Print patient’s upcoming appointments.

• If they need a work excuse: on check out screen, under Patient tab, scroll down to “Clinical Forms” and select “Return to Work/School”. Print. Fill out only the first two lines, unless told patient may not return to work by provider.

**Scheduling Appointments:**

To access a patient profile, you can search by last name, first name, DOB, and patient ID in the search box at the top of the screen. To search by first name, you must enter a “,” and then the first name.

To schedule appointment, on patient’s profile, Scheduling > Schedule Appointment. Choose the date for appointment, check the box next to the chosen time slot under the appropriate provider’s schedule.

• For New Pt appointments, select New Pt 60 on pull down at top of page before selecting date. Once date is selected, click on the appointment time. Three 20-minute slots will automatically check off, blocking off the 60 minutes for the new patient appointment. Limit number of new patient appointments to 2 a day.

• For phone appointments, select “Phone- Established 20 min”. Phone appointments will appear as “ph20” on provider’s schedule. If patient

• A patient **cannot be on a provider’s schedule and the labs schedule** for the same day. Patients typically get labs done every 3 months. If patient needs meds but has not had lab work done within the last 3 months, schedule labs first before appointment with primary provider to get meds refilled. This does not apply to Mental Health appointments.

• Approved patient applications need to have new patient appointments scheduled right away. This is to establish them as a patient and to get all of their medical history. This is required!

• Aim to schedule phone appointments in a block in the morning to prevent provider from having to switch from in-person to phone multiple times throughout the day.

Scanning into Athena Net:

• Place sheets face up, top end in the tray. Select “Fax” and click on contact book. Select “Athena Net”. If pages are double-sided, change setting from 1-sided to 2-sided. New Patient packets are double-sided.

• It may take a while for scans to show up in Athena so be sure to check at least once before end of day.

• The most common documents will be patient applications and associated documents. These will always be sorted under “Admin”. Screening forms and insurance verification forms go under “Eligibility”. Photo ID, Proof of Address (utility bills, rent, etc.), and Income Verification all have their own listing, as well. Date forms by approval date.

• If document is anything other than application forms, please ask admin under which what label it should be scanned.

• Place papers in the shred-it box ONLY after it has been verified to have faxed or placed in Athena Net. Once verified, write a check mark or “S” for scanned on each page before placing in shred box.

• If all information is complete, select “view actions”, select “Close”.

**Day’s End:**

• Put phone in “Night” mode (no earlier than clinic closing time). (DND > 2 > Hold)

• Check that all daily appointments are checked out and have a “4” by their name.

• All next clinic day schedules are printed and placed in the Med Room.

• All lab orders for next day printed and placed in binder in Lab room. If no lab orders are in chart, leave note on Faith’s desk.

• Make sure all “to be scanned” forms are scanned and sorted in Athena.

• Place fax confirmation sheets in yellow folders under radio.

• Clean up/wipe down the reception area.

• Lock front door.

• Make sure waiting room is tidy.

• If the “freebies” are running low, restock using things in supply closet next to exam room 3 (key is in the second drawer from sink at nurse’s station).

• Turn off radio, lights, TV.

• Shut down computer, turn off computer screen and mouse.

• Remember to clock-out.

• Water the plants as necessary.

• If you are last one leaving, arm the alarm.

**Other duties** may be asked of you as they arise.

If you have questions about anything above, a portion of important procedure is missing, or if the procedure changes to be more efficient than what is listed, please notify an administrator so procedure can be amended.

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**TRAINING MANUAL**