

Clerical training Checklist

Clerical

Proper Greeting to patients at front desk "Hi how may I help you?"
(Smiling, friendly)

Proper communication with patients on wait times

Able to obtain all signed forms, ID, Insurance cards from patient and
Scan into Sectra

Accurately confirm patients name, DOB, address & telephone
numbers- night or late shift duty

Check in from the Arrivals Screen and Also Exam search in Sectra

Understands Cash prices & collections policy

Zirmed (time of service collections)

Knowledge of questionnaires to give patients (depending on modalities)

Identify insurance cards and properly input data (HMO/PPO etc)

Verify Insurance Eligibility and/or Auth if needed upon arrival

Understands VRC cap vs no cap; FFS Graybill/SCMG insurance info

Verify accurate Physician matches Ordering Physician

Check in patients for scheduled or walk in procedure (input all data)

Collect Co-pays/Co-insurance and accurately deposit/document

Arrive patient ready and arrive patient ready for tech

Adds notes to Admin notes accurately with Initials

Knows proper information for billing company for patient
questions (MSN)

Quality Patient Care and Customer Service Standards met

HIPAA compliance and Certification complete per HR regulations

Support Functions

Prepare scheduled appointment packets for MRI- night or late shift

Call confirmations 24 hours ahead of time; confirming patients prep, co-pays,
locations, times for appointment. Selecting option in Sectra

Answer telephone within 3 rings, with proper VRC Greeting

Transfer phone calls properly; knowledge of phone list, rad stations etc.

Identify scheduler module in Sectra and see where schedule time slots

How to check self and site Voicemails when red lights flashing

How to request Medical records/Properly fill out forms & directions for patients
Scan into patient file/ fax to medical records

Properly call Ref Doctors about STAT/Critical Reports based on VRC protocol; close out report when finished **significant

How to add new referring Physician

How to electronically fax reports in Sectra under report delivery option

Understanding of procedures and priorities when working front desk

Understanding PM/Weekend/Duties for reference daily

Where supplies are/ordering & requesting processes
IT helpdesk/Email/Tech related issues protocol understanding

Clock in and Out properly -ADP payroll system

How to use When I work

How to check email (daily)- Office 365

Keeps work areas and lobbies clean and sanitized

Informs supervisor of any repairs, problems or patient concerns in timely manner

Follows all OSHA/Compliance and State regulations per VRC policy

Scheduling Responsibilities

Answers phone within 3 rings; proper VRC greeting with a smile

Follows VRC scripting (greeting to closing)

Completed Scheduling training *TBD

Can accurately schedule:

Mammography Screening

Breast Diagnostic/Ultrasound combo or single

Ultrasound (various along with preps)

CT (follows guidelines and protocols)

MRI (follows guidelines and protocols)

PET
Flouro procedures (accurate on schedule) Breast
Biopsy/Stereotactic
IR procedures
Research Studies
Dexa

Can find patient in Sectra, use Scheduler in Sectra to accurately schedule per patient requested date

Find order in Sectra, on X-drive and on E-fax as needed

Label and process E-fax orders accurately, save on X-drive using Adobe

Properly processes Auth and/or eligibility for orders within department

Understands Auth Assist procedure

Understands MRI/ABDO/PELVIS protocol procedure

Scans all documents under appropriate Quick Attach in Sectra

Obtains patient information, insurance information while scheduling appointment

Process Workers Comp/group account info when scheduling and how to enter into Sectra

Understands As Requested list procedures with 1st, 2nd, 3rd calls and how to cancel and fax ref doctor letter

Able to schedule walk-in exams accurately through

Knowledge of Times of Contrast/Non-Contrast exams to schedule

Knowledge of Cancellation policies (especially PET exams)
Transfer to Pet coordinator/ notify operations manager

Knowledge of Homecare/Skilled Nursing requirements to schedule
-ensuring patient is mobile

Knowledge of VRC equipment limits and regulations

Date Trained: _____

Initial of Supervisor/Trainee: _____
