

# Clerical Check List

## Opening Shift

- Unlock front door, Turn on lights, Turn on operational equipment (computers, monitors, copiers, scanners).
- Clock into ADP payroll system
- Check your email throughout the day.
- Ensure that insurance websites are open on second monitor.
- Log onto Spark
- Open doors to exam rooms turn on medical equipment (as assigned by technical lead staff).
- Turn on TV/Roku in waiting room.
- Check lobby is ready for patients- chairs are aligned, neat and organized.
- Check in with all staff attendance
- Check voice messages/return messages
- Process Daily payment log
- Answer inbound calls

## 8 Shift

- **Clock in, log into spark, open both monitors for email access, MedInformatix and eligibilities**
- Check lobby is ready for patients- chairs are aligned, neat and organized, Magazines should be available for patients. Check restrooms to make sure they are clean, soap dispensers working, paper towels available. Otherwise, notify management
- Follow up **STATS/Significant** calls
- Make sure Rx and auth matches and current
- Confirm assigned modalities/copay for next day appointment
- Count petty cash and have 2 signatures for verification
- Answer inbound calls

- Check voicemail when light is on

### **8:30 Shift**

- Clock in, log into spark, open both monitors for email access, MI, insurances
- Check lobby is ready for patients
- Confirm assigned modalities/copay for next day appointment
- Follow up Significant/Stat results
- Check voicemail when light is on
- Access waiting room, keep patients updated with appt times

### **Closing Shift**

- Recheck if all modalities been confirmed/including **add ons**
- Follow up with chaser for any missing documents needed for next day appt
- Create MRI packets for next day appointments
- Check voicemails
- Clean waiting room
- Replenish all forms(HIPPA/FINANCIAL)
- **CLOSE OUT REPORTS ON MI AND ZIRMED.** (refer to SOP for Daily Cash Closing)