

Front Office Key Result Areas

Mission Statement

To serve our community, moving them to excel in health, wellness, and life.

Vision Statement

To be the premier rehabilitation, fitness, health, and wellness organization in the Willamette Valley.

Values

1. Love
 - a. Serve and steward
 - b. Surprise and delight
 - c. Wash other people's feet
2. Growth
 - a. Personal excellence
 - i. Mind - intellectual and emotional
 - 1 Knowledge, understanding, self-worth
 - ii. Body - physical and financial
 - 1 Health
 - iii. Soul - spiritual and social
 - 1 Relationships characterized by love, joy, peace, patience, kindness, goodness, faithfulness, gentleness, and self-control
3. Grace
 - a. We were first loved
 - b. We should not cast the first stone

Front Office Staff
Lead Aide/Office Administrator
Office Manager
Administrative Operations Manager

Communication: *The team member communicates effectively in a way that is professional, respectful, articulate, and timely.*

- Warmly greets every patient at arrival with a verbal salutation and a smile
- Notifies therapist of patient's arrival immediately
- Acknowledges every patient standing within a five-foot radius of the front desk to ensure he/she is being helped
- Always responds to "thank you" with "my pleasure"
- Gives a warm, verbal salutation at the departure of every patient
- Takes clear and concise phone messages, including the call to action
- Demonstrates effective change-of-shift reporting
- Maintains supply list, updating the spreadsheet one to two weeks prior to running out of supplies
- Completes resale inventory weekly and swag inventory monthly
- Orders supplies weekly, including resale inventory
- Maintains resale lists, including updating the pricing in the EMR and the spreadsheet, as well as ensuring that the affiliate items are in stock and represented accurately on the website
- Orders swag items quarterly, or more often as necessary
- Completes expense reports weekly, or more often as necessary
- Responds to emails or messages within two working days or by the deadline indicated
- Has a signature block on all emails including the company logo, name, credentials, title, address, email, phone number, fax number, and hyperlinks to our website and Google and Facebook review forms
- Notifies the opening front office team member or office manager of absence greater than an hour prior to the start of the workday
- Refers to therapists as "Doctor..." when on the phone or when in front of patients
- Speaks with love and respect to all patients and team members, promoting unity
- Does not gossip by sharing problems or gripes down or laterally with team members who have no control over the issues; rather, communicates these problems with leadership
- Communicates professionally with patients, referring providers, and insurance companies
- Maintains professionalism by conversing with team members about personal matters in an appropriate and quiet manner when patients are within ear shot

Development: *The team member manifests the vision of the practice by enthusiastically participating in the mission of the practice.*

- Strives to grow in all 6 Pillars of Health daily
- Shows initiative by asking for assistance when unsure of a procedure, the answer to a patient's question, etc.
- Leads training of new front office team members
- Leads training of new front office managers
- Contributes to orientation of new team members
- Continuously develops and coaches front office staff
- Continuously develops and coaches front office managers
- Requests observation of treatment session weekly
- Actively participates in rounds/mentorship
- Participates in at least one community service project and/or marketing event per quarter, or when asked, creating visibility and/or contributing to the development of new referral sources
- Helps to create pieces for social media use when instructed
- Assists in planning and coordinating marketing initiatives
- Reads Entreleadership, by Dave Ramsey
- Listens to Entreleadership podcast weekly

Flexibility: *The team member demonstrates a willingness and readiness to respond to the evolving needs of the practice.*

- Seeks to participate in the development and growth of the practice
- Helps to develop, accepts, and executes new policies and procedures
- Regularly adjusts schedule to accommodate the needs of the practice
- Regularly demonstrates ability to multi-task and prioritize appropriately
- Allocates 5-10 focused hours each week for "closet time"
- Participates in meeting with clinic supervisor weekly to provide status updates and prioritize action items
- Leads weekly front office staff meetings
- Leads weekly front office manager huddles
- Completes front office 90-day and annual performance evaluations
- Provides feedback for front office managers' performance evaluations
- Participates in meeting with Chief Financial Officer monthly, or more regularly as needed, to provide status updates and prioritize action items
- Assists with other central office tasks when other central office team members are out of the office
- Assists with weekly bank deposits when other central office team members are out of the office

Productivity: *The team member effectively contributes to the financial health of the practice.*

- Manages time well

- Calls all qualified new referrals to schedule an initial evaluation within one business day of receiving the referral
- After the first attempt, calls all new referrals every other week up to three times in an attempt to schedule an initial evaluation
- Maintains an updated call list when a patient is unable to schedule in accordance with the recommended PT POC due to a conflict
- Calls any patient who is 5 minutes late and attempts to reschedule the appointment if the patient cannot make it
- Always attempts to reschedule a cancelled appointment
- Calls any patient who no-shows and attempts to reschedule the appointment
- Maintains an updated call list when a patient cancels or no-shows an appointment
- Always confirms a patient's next appointment when the patient calls to cancel an appointment
- Prioritizes filling the schedule, second only to attending to a patient who is present or attending to the phones and urgent requests of the therapists
- After initial attempts at filling the schedule have been made, converses with the therapists for additional direction
- Reviews active list weekly to ensure all patients are scheduled for appropriate POC, on call list appropriately, or on hold list appropriately
- Places patient on same-day call list after the third cancellation or no-show
- Appointment efficiency (openings + unfilled cancellations/total appointment slots) above clinic standards
- Prioritizes filling beginning- and end-of-day openings equally with other openings
- Works closely with clinic supervisor to maintain full therapist schedules
- Facilitates completion of monthly metric reports
- Reviews relevant metrics with front office as necessary

Quality of Work: *The team member achieves patient satisfaction and completes required tasks with excellence.*

- Net Promoter Score at or above 8
- Regularly serves patients by opening doors, taking or giving a jacket, offering water, giving a hand to the car, etc.
- Regularly asks patients about things they have shared regarding their personal lives
- Recalls the names of patients' significant others and/or caregivers
- Regularly compliments patients
- Walks patients back for warm-up, ensuring proper equipment set-up and patient comfort
- Sets up equipment and modalities safely and effectively as per PT instructions
- Is highly organized and detail-oriented
- Prepares treatment rooms and tidies up the waiting room and gym area after check out/check in

- Keeps up with laundry and distributes throughout clinic evenly
- Completes and updates daily, weekly, and monthly cleaning list
- Accurately performs insurance verifications
- Accurately reviews financial obligations with patients
- Assists the back office with the completion of insurance pre-authorization requirements
- Ensures schedules reflect the need for a status report when indicated
- Assists patients through required paperwork and ensures accurate completion
- Accurately inputs patient demographics, insurance, appointments, and health questionnaire
- Uploads patient documents including referral, intake forms, insurance card, imaging, and HEPs into EMR in a timely manner
- Transmits, tracks, and receives required patient records
- Processes and collects payments accurately
- Prepares for following business day, including printing a schedule for each therapist
- Follows closing procedures
- Completes exclusions tracking monthly
- Regularly updates front office clinic documents, including but not limited to 1) clinic policies and procedures, 2) password manual, 3) insurance contract information, 4) interview templates for front office staff and therapists, 5) employment agreements for front office staff and therapists, and 6) training procedures for front office staff and therapists
- Creates and manages the front office schedule
- Manages all front office time off requests, including adjusting front office coverage as necessary
- Leads front office hiring process including job posting, screening, interviewing, collaborating with clinic supervisor regarding offer, offer presentation, and onboarding
- Leads front office manager hiring process including job posting, screening, interviewing, collaborating with clinic supervisor regarding offer, offer presentation, and onboarding
- Organizes birthday celebrations as well as biannual clinic get togethers

Work Habits: *The team member is enthusiastically compliant with practice policies and procedures.*

- Integrates values of love, growth, and grace in all interactions
- Follows HIPAA regulations
- Follows Fraud, Waste, and Abuse regulations
- Follows policies and procedures described in the employee handbook
- Maintains good attendance record
- Requests and records PTO in a timely manner
- Arrives to work 10-15min before scheduled
- Attends staff meetings

- Maintains organized desk space
- Cleans up after self
- Helps other team members with duties when able
- Contributes to clinic culture by participating in the day-to-day back-and-forth and clinic outings
- Seeks immediate resolution of discourse with fellow team member
- Takes direction and responds to feedback
- Maintains a clean and professional appearance