



Position Title: Medical Receptionist
Manager Position: Lead Receptionist

Result Statement:

To check each patient in and out following correct protocol, welcome the patient to Carousel with a smile, and treat people with compassion and dignity.

Tactical Work Responsibilities:

1. _____ Make eye contact, identify yourself, and greet every patient by name (if possible) with a smile saying, "Welcome to Carousel, how may I help you?"
2. _____ Let each patient know what you are doing and why you are doing it.
3. _____ Before ending the interaction, ask, "Is there anything else I can help you with today?"
4. _____ Follow all check-in and check-out protocols for every patient.
5. _____ Contribute to a positive work environment by respecting and willingly serving other team members and refusing to tolerate unacceptable treatment of others.
6. _____ Inventory and maintain office supplies and forms.
7. _____ Create new charts following Carousel's uniform standards.
8. _____ Verify insurance eligibility for every patient and document and/or print forms as needed.
9. _____ Schedule follow-up appointments as needed.
10. _____ Notify patients of any billing conflicts at appointment.
11. _____ Print Superbills as needed.
12. _____ Update insurance cases as needed.
13. _____ Obtain payment plans as needed.
14. _____ Notify billing department of patients with outstanding balance.
15. _____ Balance and reconcile money collected during shift.
16. _____ Close credit card machine for charges and e-checks at the end of each shift.
17. _____ Verify demographic and insurance information for every patient and update in Medisoft.

18. _____ Collect payment for services and issue receipts for all cash transactions.
19. _____ Participate in daily pre-shift huddles.
20. _____ Assist providers, medical assistants, and file room team with patient requests.
21. _____ Create new patient charts.
22. _____ Inventory patient and billing forms.
23. _____ Practice HIPAA compliance at work and off duty.
24. _____ All other duties as assigned.

Company-wide Standards

1. _____ All OSHA, HIPAA, and other government regulations will be followed.
2. _____ All work will be performed according to company policies, procedures, and standards inherent in all position contracts, employee handbooks, and ongoing policy changes. The information included in these documents is proprietary.
3. _____ You will hold all team members to a high standard of performance.
4. _____ All duties will be performed diligently and efficiently.
5. _____ Carousel will be a safe, fun workplace in which every team member is valued, respected, and given an opportunity to fulfill their aspirations.
6. _____ Employees will be committed to living out Carousel's mission and be proud to come to work everyday.
7. _____ World-class customer service standards will be performed at all times.
8. _____ A smile and cheerful attitude will be part of your uniform.
9. _____ Employee dress code including name badges above the waist will be worn at all times
10. _____ You will take responsibility for keeping the appearance of the offices clean and organized. Facilities problems will be addressed immediately.
11. _____ Attendance, punctuality, and other employee policies as recorded in the employee handbook will be adhered to.
12. _____ Company email only will be read twice a day and responded to within 24 hours.

