



Key Results Area: Customer Service, Front Desk

Team Member Name: _____

What Winning Looks Like

- Remember PEOPLE are OUR business. Keep the needs of the patient first in all decisions.
- Greet patients by name. Offer them coffee or water.
- Develop relationships with patients. Get to know them as individuals.
- Document pertinent patient correspondence and phone calls.
- Manage patient accounts and collect patient payments
 - Manage medical records.
 - Collect patient payments at least 1x/week.
 - Keep monthly A/R report to one sheet.
 - Facilitate patients to payment plans as needed.
 - Review EOBs and update patient accounts as needed.
- Complete all Insurance Verifications and Authorizations before the completion of the first appointment.
- Continuity: Work to keep patient with the same therapist with the exception of the evaluation.
- Keep Physical Therapists Productive (team at >90%).
- Promote Nephew PT brand and ask for online reviews e.g. Google, Facebook, Yelp, etc.
- Works as an integral part of the Nephew PT team in order to achieve a customer service rating of 90%.

Computer | Phone

- Return all emails within 1 business day.
- Return all phone calls by end of business day.
- Call all new referrals same day of fax being received.
- Call all cancellations | no shows by end of business day.

General Duties

- Perform tasks as assigned by Leadership.
- Cover Vacation time for other team members of the front desk.
- Gatekeeper for Melissa and other team members as appropriate.
- Strives to be a lifelong learner and continues to grow personally, spiritually and / or professionally through continued education, reading, attending seminars and interaction with other team members.

Team Member

Date

Team Leader

Date