



Clinic name

Address · Phone · Licence no.

Front desk SOP and daily checklist

Print one per day: open with the first list, follow the steps for each patient, close with the last list.

Date _____ Branch _____ Shift _____
Front desk _____ Start time _____ Lead _____

1 · Opening checklist

- ☐ Float counted and written down
- ☐ Card machine and printer on, paper stocked
- ☐ System, phone and clinic WhatsApp working
- ☐ Day list printed for each doctor and room
- ☐ Confirmations reviewed; unconfirmed patients called
- ☐ Insurance eligibility checked for today's patients
- ☐ Consent forms ready for today's procedures
- ☐ Waiting area and rooms tidy

2 · For every patient

Step	What good looks like	✓
Greet	Greet the patient by name and say how long the wait is likely to be.	☐
Verify the file	Name, phone, ID number and insurance card match the patient file.	☐
Consent	A signed consent form for today's procedure, where it needs one.	☐
Insurance eligibility	Eligibility checked, and the pre-approval number noted where needed.	☐
Deposit or package	Deposit taken, or the session drawn from the patient's package.	☐
Room ready	Doctor or assistant told the patient is here; room and device ready.	☐
Next appointment	The next visit is booked before the patient leaves, with an appointment card.	☐
Payment	The amount matches the plan or quote, with the insurer's share applied.	☐
Invoice	An invoice or receipt for every payment, handed over or sent.	☐
Review request	Only if the patient was happy: show the review QR or send the link.	☐

Today in numbers

Booked _____ Arrived _____ Missed _____
Walk-ins _____ Next visit booked _____ Review requested _____

3 · Closing checklist

- | | |
|--|--|
| ☐ Closing slip: cash counted, matched to the system, signed | ☐ Cash put in the safe or banked |
| ☐ Tomorrow's list printed and checked | ☐ Confirmations sent to tomorrow's patients |
| ☐ List of balances owed by patients reviewed | ☐ Paper files put away, desk cleared |

Cash per system Cash counted Difference and reason

4 · When to escalate

Situation	What the front desk does	Who decides
Complaint	Listen without interrupting, log it in the complaint log and tell the patient when they will hear back.	Clinic manager; reply within 24 hours
Refund request	Never refund from the till. Write down the request, the reason and the invoice number.	Finance or clinic manager
Package patient misses a visit	Call the same day, offer a new time and note the missed visit on the file.	Front desk lead
Emergency	Tell the doctor on duty at once, call emergency services if they ask, note the time.	Doctor on duty
Insurance declined at the desk	Explain the patient's share before the service; do not start without their agreement to pay.	Insurance officer

One rule

Anything not on this page is written down and passed to the lead the same day, and the patient is not promised anything that has not been decided.

Notes from today

Closed by

Reviewed by

In Medicolize the day list, confirmations, balances owed and the closing slip come from the system itself: [medicolize.com](https://www.medicolize.com)