

Guidelines for appointment booking

- Ask for entire name, whether new patient, date and time requested, DOB, phone number
- Ask purpose of visit, which may include sick (note the reason), developmental check, vaccination, medical exam, advice appointment, or Lamaze discussion
- Ask if patient will see Dr. Joyce (especially for new patients as Dr. Joyce develops her practice)
- Ask if vaccines will be needed
- Ask if any additional documentation will be needed
- Ask if any other children need to be seen
- Schedule at most 8 appointments per doctor for the following day**

Block off time in calendar based on scenarios (per child):

- 1-2 vaccines only (with NO doctor visit): 10 minutes
- Normal sick visit: 20 minutes
- Normal well child visit, new baby/patient: 30 minutes
- New parents, complicated birth, developmental problems: 40 minutes

To book adoption appointments:

- Ask what adoption agency the family are using- get Little angels form if needed
- Review vaccines and advise parents on what vaccines are needed
- Review growth & developments
- Advise on what lab tests if are needed

Daily Checklist: Cashier

8-9:20 am

- Prepare bank money orders for transport via courier in increments of 70K shillings; note in ledger and file receipts when they come back
- Finish entering charge sheet information from previous day into Doc Clinic
- Assist with answering phones at reception (see below for reception procedure)
- Enter financial summaries from previous day Doc Clinic reports into QuickBooks
- Follow up via phone/SMS with patients who have been extended credit and have not yet paid
- Assist office administrator with processing ETF and relating them back to individual invoices
- Ensure exam rooms are stocked with ASQ developmental check forms

9:20 am -1:30 pm

- Assist with answering phones at reception (see below for reception procedure)
- Process patient payments from charge sheets, entering information into Doc Clinic and generating receipts
- Process payments from patients/couriers as related to previous appointments paid with credit
- Assist patients with filling out insurance forms with personal/appointment information
- Generate next appointment cards, and enter upcoming appointment into Doc Clinic

1:30-2:30 pm

- Lunch

1:30-4:30 pm

- Same tasks as morning
- Engage receptionist to assist with backlog of patient payment activities

4:30-5:30 pm

- Same tasks as morning
- Print out appropriate reports from Doc Clinic / QuickBooks, whether daily, weekly, or monthly
- Verify money collected (in all forms) with office administrator
- Print from Doc Clinic list of patients with upcoming appointments for reception to call

Daily Checklist: Nurse

8-9:20 am

- Review daily schedule and prepare vaccination list and help receptionist to prepare patient files
- Count vaccines in all refrigerators, compare to stock list and current day's needs
- Order needed vaccines to maintain proper supply
- Enter new vaccine inventory into Doc Clinic (may also be done end-of-day)
- Call back patients whose lab results have been received with signoff to call from a doctor
- Ensure that all exam rooms are properly stocked with cleaned equipment
- Manage locum nurse, reviewing daily activities and plan for patient flow
- Obtain early approval for regularly scheduled vaccines from Dr. Joyce, ask Dr. Nesbitt to confirm

9:20 am -1:30 pm

- Triage patients, taking height, weight, head circumference, and brief history, using appropriate template forms for questions if patient has not filled out beforehand
- Refer any emergency patients to doctor or casualty immediately
- Copy patient vaccination history and update to all appropriate forms (patient card, clinic vaccine sheet, patient history card)
- Check with doctor for approval on potential vaccines/doses, nebulizer administration, etc
- Administer vaccines, nebulizer, etc as appropriate, with doctor assistance if necessary
- Fill out charge sheet with time in/out for triage and vaccination, as well as with any chargeable procedures performed

1:30-2:30 pm

- Lunch

1:30-4:30 pm

- Same as morning activities

4:30-5:30 pm

- Peruse upcoming daily schedule to determine need for hiring locums
- Complete Doc Clinic vaccination entry
- Clean-up used materials (e.g. ear pieces, dressings, etc)
- Escort patients to ward for admission (if necessary)
- Collect orders from the GGCH pharmacy

Daily Checklist: Office Administrator

8-9:20 am

- Ensure necessary staff arrive
- Ensure all office equipment is working properly
- Attend morning non-clinical staff meeting – coordinate staff activities for the day
- Attend morning meeting with Dr. – identify any potential bottlenecks and issues
- Assist with answering phones at reception (see below for reception procedure)

9:20 am -1:30 pm

- Ensure financial summaries from previous day Doc Clinic reports entered into QuickBooks
- Receive wire transfers (EFT) and balance against individual invoices
- Assist with answering phones at reception (see below for reception procedure)
- Resolve any patient complaints or scheduling conflicts
- Resolve any staff conflicts or bottlenecks
- Assist with any special projects, such as EMR implementation, office efficiency changes etc.
- Relieve reception from 12:30-1:30pm (alternate with Cashier)

1:30-2:30 pm

- Lunch

1:30-4:00 pm

- Assist with answering phones at reception (see below for reception procedure)
- Resolve any patient complaints or scheduling conflicts
- Resolve any staff conflicts or bottlenecks
- Assist with any special projects, such as EMR implementation, office efficiency changes etc.

4:00-5:00 pm

- Update accounts receivable collections for the day (with Cashier)
- Prepare clinic bills for payment and cheques for deposit (provide to Cashier)
- Reconcile days payments with cashier, prepare appropriate reports from Doc Clinic/QuickBooks, and sign-off
- Meet with Dr. to review days payment sign-off

Weekly Checklist:

- Prepare report for follow-up appointments to schedule. Provide to receptionist and follow-up on completion.
- Assist accountant and auditor by preparing weekly clinic reports
- Attend weekly full staff meeting (Saturday)

Monthly Checklist:

- Assist accountant and auditor by preparing monthly clinic reports
- Prepare and submit payroll (once/month)
- Prepare and submit taxes (once/month)

Daily Checklist: Receptionist

8-9:20 am

- Oversee cleaning; ensure all exam and triage rooms are stocked and cleaned
- Call patients (identified by Doc Clinic) for appointment reminders; note call results in system
- Photocopy daily schedule and distribute to all staff members
- Pull out files for current day's patients and prepare by attaching history card and charge sheet filled out with patient name/number and doctor seen- give to nurses/doctors for review
- Receive lab results for patients and prepare for nurse to review
- Answer phones for scheduling, follow-up, and doctor consultations

9:20 am -12 pm

- Answer phones for scheduling, follow-up, and doctor consultations (see appointment booking guidelines)
- Documents to prepare for new patients:
 - Dictated hospital discharge summary, if ready (for newborns only) – prepared by office admin.
 - Newborn hospital ID card (for newborns only)
 - Clinic patient registration form
 - Clinic vaccination record
 - Gertrude Children's Hospital lab request form
- Handle new patient registration (appropriate forms based on new/existing patients and visit purpose)
- Lead waiting patients to triage, doctor, vaccination, or cashier when available
- Arrange for non-critical walk-ins to wait for a gap in scheduled patients to see their doctor (ask about seeing another doctor)
- Arrange for critical walk-ins to see doctor immediately, or refer to casualty if doctor unavailable
- SMS or call patients who have appointments more than an hour off, if clinic is experiencing delays of more than 30 minutes

12-1 pm

- Lunch

1-2:30 pm

- Same as morning tasks

2:30-4:30 pm

- Same as morning tasks
- Assist cashier with backlog of payment activities

4:30-5:30 pm

- Continue above receptionist responsibilities
- Plug in all phones to charge and redirect phones to doctor on call for the night
- Arrange necessary follow-up calls for doctors to sick patients
- Make note of patients who did not show for appointments that day and highlight for doctor
- Call remaining patients with appointment reminders for next day

Guidelines for Triage

Begin by encouraging parent to change diaper (if age appropriate) in preparation for weighing

For all NEW patients (regardless of age)

- What brought you to the clinic today?
- Where was the child born (hospital and country)?
- What was the mode of delivery?
- When did you move to Kenya? From where?
- What is the child's birth order (e.g. only child, second born etc)?
- Is the child up to date with his/her vaccines? Do you have his/her vaccine record with you?
- Does the child have any allergies?
- Is there any history of disease in the family?
- Has the child ever been admitted to the hospital or operated on?
- Has your child been taking any medications?
- Are there any other concerns to note about the child's health?
- (If applicable) What year was the child diagnosed with condition X (e.g. ADHD, etc)?
- Where does the child study?

For NEWBORN patients

- Where was the child born (hospital and country)?
- What was the birth weight?
- What vaccines were administered at birth?
- Were any specific tests done at birth?
- Any problems at delivery (e.g. jaundice, eye infection etc.)?
- Any specific delivery care (e.g. incubation, resuscitation etc.)?
- How is the baby feeding? (i.e. exclusive breast milk, formula, or mixed feeding?)
- How many poos and pees per day?
- How is the baby sleeping?
- What has been the reaction of the older siblings to the new baby?

For DEVELOPMENTAL/WELL patients

- Is the child up to date with his/her vaccines? Do you have his/her vaccine record with you?
- Does the child have any allergies?
- Has your child been taking any medications?
- What is the child eating? How is the child feeding?
- Are there any other concerns about the child's health?
- Any recent strange habits you would like to discuss (e.g. bed wetting etc.)?
- Is the child experiencing any current illnesses?

For SICK patients

- What brought you into the clinic today?
- Can you describe the incident (for cases where child has come in relating to injury, wound, etc.)?
- How is the child feeling now? Please describe the child's symptoms.
- Is your child vomiting or having diarrhea?
- Have you traveled recently? When and where?
- Has your child had any lab tests done. If yes, what were the results and do you have a copy?
- Has the child been admitted to the hospital or operated on for the current illness?
- Has your child been taking any medications?
- Does the child have any allergies?
- Are there any other concerns about the child's health?