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?