Clinic Operations Pack: Front Desk + Calls + No■Shows

Practical scripts, workflows, and trackers to reduce front desk errors, convert calls, and fill the schedule — without sounding salesy.

1) Front desk insurance capture (90 seconds)

Front desk is upstream revenue protection. Use a script so quality is consistent.

Must-capture	Why it matters
Subscriber ID + Group #	Payer match + routing
Relationship + Subscriber DOB	Eligibility matching
Plan name + card images	Proof + correct payer contacts
PCP/referral rule (if plan)	Avoids referral denials

Script: "To prevent billing delays, I'll verify your coverage quickly and take a photo of the card. It takes 20 seconds."

2) Inbound call framework (pattern interrupt)

Patients often ask price first. Don't answer price first. Guide first.

Pattern interrupt: "Before we talk pricing, can I ask what's happening today? I want to make sure you don't waste a trip."

Step	What to say (example)
Clarify	"What's happening today and how urgent is it?"
Reduce anxiety	"We'll check you in, the provider evaluates you, then we explain the plan clearly."
Offer 2 options	"Soonest times are 3:10 or 4:40 — which works?"
Confirm	"I'll text location + what to bring. Reply C to confirm."

3) No■show reduction (targeted + respectful)

SMS reminders reduce missed appointments. The upgrade is targeting: heavier reminders for higher-risk visits.

Use micro■commitment: reply **C** to confirm or **R** to reschedule.

Timing	Message (example)
48h	"Reminder: [Clinic] visit [Day] at [Time]. Reply C to confirm or R to reschedule."
24h (high risk)	"Quick check■in: can you still make it tomorrow at [Time]? Reply C or R."
2h	"We're ready for you at [Time]. Address: [link]. Reply C to confirm."

Optional behavioral nudge: "If you can't attend, please cancel so we can offer the slot to another patient."

4) Schedule fill system (10-minute rule)

Cancellations should become filled slots quickly.

System	How to run it
Live waitlist	Same-day / 48h / next week categories
Fill script	"We had an opening today at [time]. Want us to reserve it?"
Owner	One person owns fill outcomes daily
KPI	Waitlist fill rate weekly

5) Call QA scorecard (keep quality high)

Sample 10 calls/week. Coach one behavior/week.

Item	Pass criteria
Need clarified	Reason + urgency confirmed
Next step explained	Patient understands what happens
Two options offered	Clear choice given
Confirmation captured	Text sent + reply requested
Tone	Calm, helpful, not rushed