Patient Arrival & Check-In SOP

The Workday Companion | A quick guide at the front desk

FRONT DESK & PATIENT ACCESS · FICTIONAL SAMPLE · VERSION 0.1

START HERE

Use this guide for a scheduled patient's arrival. Follow current practice policy and approved system instructions. Your role is administrative: do not assess symptoms, offer clinical advice, or change care.

QUICK CHECK-IN

1 GET READY Sign in with your own account. Open the approved arrival queue. Protect the screen and papers. If the system is down, use the downtime process.

2 WELCOME DISCREETLY Greet respectfully. Ask for the information needed to find the appointment without announcing sensitive details.

3 VERIFY FIRST Use approved identifiers and identity-check steps before opening or changing a record. If information does not match, stop and call the Patient Access Lead. Never guess or continue in a questionable chart.

4 CONFIRM THE VISIT Find the scheduled appointment in the approved system. Do not share visit or patient details with an unverified caller or companion.

5 COMPLETE AUTHORIZED FIELDS Ask the patient to confirm required administrative details. Change only what your role permits. Route disputed or restricted changes to the lead.

6 HAND OFF Provide current approved forms. Route questions about symptoms, consent, treatment, results, or care to licensed clinical staff. Mark arrival and notify the care team through the approved channel.

7 CLOSE THE LOOP Confirm status is recorded. Secure papers and screen. Put open administrative work in the approved queue with an owner and next step.

WHAT IF…?

The identity details do not match?

Pause. Do not open or edit a questionable record. Contact the Patient Access Lead and follow the identity-resolution process.

The patient mentions symptoms or urgent concerns?

Do not decide how serious they are. Immediately use the approved clinical escalation or emergency response path.

A companion requests information or wants to complete check-in?

Do not decide their authority yourself. Follow practice verification and representative rules; ask the lead when unclear.

The system is unavailable or information may be in the wrong record?

Stop the affected task, protect information, and use the downtime or incident-reporting process. Notify the designated lead promptly.

REMEMBER

Verify before viewing or editing. Share only what is needed. Keep clinical decisions with licensed staff. Record status and next owner in an approved system.

OWNER Patient Access Lead **APPROVER** Practice Administrator **REVIEW** [date]

Fictional demonstration only. Not legal advice, clinical guidance, or a ready-to-use procedure. Confirm actual practice rules, systems, and contacts before adoption. No real patient information.