

Front Office Training Checklist

EMPLOYEE INFORMATION

Name: \_\_\_\_\_ Start date: \_\_\_\_\_  
 Manager: \_\_\_\_\_ Trainer: \_\_\_\_\_

TASK	Date Trained	Employee Performance	Trainer Comments	Employee Initials
<input type="checkbox"/> <b>Scanning</b> <ul style="list-style-type: none"> <li>• Insurance Cards</li> <li>• Photo ID</li> <li>• Forms</li> </ul>		<input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory		
<input type="checkbox"/> <b>Phone</b> <ul style="list-style-type: none"> <li>• Protocol how to answer</li> <li>• Transfer a call</li> <li>• Use the intercom</li> <li>• Checking V/M</li> <li>• Taking a message</li> </ul>		<input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory		
<input type="checkbox"/> <b>Fax</b> <ul style="list-style-type: none"> <li>• Memory</li> <li>• Speed Dial</li> </ul>		<input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory		
<input type="checkbox"/> <b>Copier</b> <ul style="list-style-type: none"> <li>• Enlarge &amp; Shrink</li> <li>• Duplex</li> <li>• By-Pass</li> <li>• Other</li> </ul>		<input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory		
<input type="checkbox"/> <b>Computer</b> <ul style="list-style-type: none"> <li>• Sign-on</li> <li>• Appointment Scheduling (including walk-ins and next day)</li> <li>• Demographic data entry</li> <li>• Printing</li> </ul>		<input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory		
<input type="checkbox"/> <b>CHECK IN / CHECK OUT</b> <ul style="list-style-type: none"> <li>• How to Greet</li> <li>• Required Info</li> <li>• Info Verification</li> <li>• Payment Collection</li> <li>• Receipts</li> </ul>		<input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory		
<input type="checkbox"/> <b>CREDIT CARD MACHINE</b> <ul style="list-style-type: none"> <li>• Charge</li> <li>• Credit</li> <li>• Void</li> <li>• Batching</li> </ul>		<input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory		
<input type="checkbox"/> <b>END OF DAY</b> <ul style="list-style-type: none"> <li>• Reports</li> <li>• Reconciliation</li> </ul>		<input type="checkbox"/> Satisfactory <input type="checkbox"/> Unsatisfactory		

Trainer Signature: \_\_\_\_\_ Date: \_\_\_\_\_