



DALMOR

MEDICAL ADMINISTRATION TRAINING INSTITUTE
A DIVISION OF DALY MORGAN & ASSOCIATES

Building 7, Parc Nicol, 3001 William Nicol Drive,

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Gauteng, South Africa

Tel: 011 548 7400 / Fax: 086 683 8805

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Front Desk Administration: Medical Secretary Agenda

1. The roles and responsibilities of the medical receptionist
 - a. Clerical duties
 - b. Petty cash
 - c. Customer Service
 - i. Communication
 - ii. Assertiveness
 - iii. Listening Skills
 - iv. Handling rude or impatient callers
 - v. Dealing with difficult patients in a practice

2. Medical Office Administration
 - a. Appointment Scheduling and Diary Management
 - b. Patient Etiquette
 - i. Telephone
 1. Answering calls
 2. Making calls
 3. Placing calls on hold
 4. Taking messages
 - ii. Voicemail
 1. Voicemail Greetings
 - iii. Email
 1. Use an accurate subject line
 2. Keep paragraphs short and concise
 3. Avoid excessive CCs and BCCs



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4. Avoid caps locks

3. Patient Notes and Records

- a. POPI and PAIA Act
 - i. Requests for Access
 - ii. Medical Records
 - iii. Social Media

4. Assisting the Accounts Department

- a. Member validation
- b. Day list
- c. Confirmation of benefits
- d. Terms and Conditions Documents
- e. New Patients
- f. Summary of Receipt
- g. Outstanding Accounts
- h. Patient Consent
- i. Patient Documents

5. Medical Terminology

6. Legal and Professional Responsibilities

- a. National Health Act
- b. Occupational Health and Safety Act
- c. Patients Constitutional Rights

7. Basic conditions of Employment in your Medical Practice



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