

## **Office Forms at Hand**

### **Located on top of two drawer file cabinet:**

- Front Office Use Binder – In the Front Office Use Binder you will find a daily checklist for the front desk, front office instructions, CA Calendar for use in scheduling appointments, How to schedule appointment instructions, telephone use instructions, abortion minded caller guides, directions, How to make a church referral instructions, Espanol instructions, frequently used phone numbers and a miniature resource manual.

### **In the two drawer file cabinet, located on top of the computer tower:**

- Request for Services Form (English): This form is given to every client every time they have an appointment. The signed form goes in their client file.
- Medical Consent Form (English): This form is only given to every pregnancy test and ultrasound client. A signed copy of this form must be in the client's file every time they have a pregnancy test or ultrasound.
- Espanol Request for Services and Medical Consent Forms
- Blessing Boutique Bucks – Clients will collect their bucks at the front desk to spend in the boutique. They may also come in to spend their bucks on diapers and wipes, etc. Please be sure to place bucks back into the money bag.
- Baby Bottle Form – If someone drops off filled baby bottles, please complete one of these forms. You will need their name, church and number of bottles. We will want to move these bottles to the conference room (Out of sight of clients as quickly as possible). If someone is available to shake them out into a bag and keep the Baby Bottle Form with the change. Make sure the cash and checks are recorded on the form and give to Rose. For complete instructions, see How To Manual.
- Blessing Boutique Form – Client must have this form to shop a boutique.
- Donor Thank You's – We want to send all first time donor's a thank you card. Look in the "How to" binder on how to write the thank you.
- Ekyros – Place copies of checks here. All donations will be entered into donor management. (You must be specifically trained for this job)
- "Have a seat" sign – Put in window if you have to leave the front briefly and there is no one else to cover for you. Always try to get another Client Advocate to cover for you, then the Client Services Director and then the Executive Director.
- Item Donation Log – When a donor comes in to donate items, please record their information on the log and ask them if they need a tax receipt. You may direct them or take them to the back door of the boutique to drop off their donation or call a shopping assistant if available to help them carry their donations..

- Item Donation Receipt – This is the receipt you give them if they want a tax receipt. You can sign it, but they can fill it out.
- Image and Likeness Release Form – If we take a picture of a client or their baby we must have their consent to place their photos on the board and/or use if for promotional purposes.
- Prayer and Praise Cards – You can fill these out and place them in the prayer binder when someone calls in with a prayer request or praise report.
- Proof of Positive Pregnancy – Many of our clients need a proof of positive pregnancy form to take to the Medicaid office. The client advocate will get this out and complete it for the client
- Ultrasound Policy (to give to clients that may question our policy)

Other Forms:

- Client's Doctor's Excuse – Client may ask for this
- Medical Information Release – Client must sign if we need to give info to doctor
- Liability Release for Equipment – Client must sign when they take equipment from boutique
- Client Ultrasound – For Ultrasound Technician Use
- Proof of Negative Test – Client may request

Front Desk Items:

- You may want to watch a training DVD while doing other things at the front desk.
- Message pad – You may use if Rose or I are out. Use scrap paper if available.
- If you are the only one here and need to leave the center, make a "Will return shortly" sign on a piece of paper, and put it in the door window.