Front Desk Assistant: Quick-Start Guide and Rollout Plan

By Marcus Turner · November 2026 · Coastal Care Family Medicine is a fictional clinic. All names, numbers and extensions are made up.

This document has two parts. Part 1 is the one-page guide every front-desk staff member gets on day 1. Part 2 is the plan for launching the assistant: who owns it, the 30-minute training session, the 3-week launch, and how feedback and freed-up time are handled.

Part 1: Quick-Start Guide

For new front-desk staff. One page, 3 minutes to read.

What it is

The Front Desk Assistant answers "how do I handle this?" questions in seconds, straight from our SOPs. Ask it before you consult Marisol.

Use it for: booking rules, check-in steps, insurance problems, copays and balances, check-out, and "who do I send this to?"

Don't use it for: anything about a patient's health. Symptom questions go to Nurse Santos (ext. 230), and emergencies go to 911.

How to ask

Describe the situation, never the patient. Type what's happening the way you'd say it to Marisol, but leave out names, birthdays and ID numbers.

Instead of this	Ask this
"[Patient name], DOB [date], insurance says inactive"	"Coverage came back inactive and the patient has no new plan. What do I do?"
"Can the [family name] kid come in with his grandma?"	"A grandmother brought her grandson for a well-child visit. Is that OK?"
"Insurance?"	"Eligibility says the plan is out of network. What do I tell the patient?"

Tip: one question per message works best. If the answer doesn't fit your situation, add a detail and ask again.

Reading the answer

Every answer has the same three parts, so you always know where to look.

Part	What it tells you
Do this now	The steps to take, in order
Send to	Who takes it from here and how to reach them, or "No one: you can handle this"
Source	Which SOP and section the answer comes from, so you can check it

The 4 rules

1. **No patient details, ever.** No names, birthdays, member IDs or phone numbers. Patient information belongs in ChartWell, not in the assistant.
2. **Health questions go to people.** Symptoms go to Nurse Santos. Emergency warning signs mean the caller hangs up and calls 911 now. Don't ask the assistant whether something can wait.
3. **The patient comes first.** If someone is waiting and you're unsure, follow the answer's "Send to" line or ask Marisol. Don't keep a patient waiting while you type.
4. **The SOPs win.** If an answer ever seems to disagree with an SOP, follow the SOP and tell Marisol.

When it's wrong or unsure

- **"The SOPs don't cover this"** is a good answer. It means the assistant isn't guessing. Ask Marisol (ext. 201), then Dana (ext. 200).
- **If an answer looks wrong or incomplete,** follow the SOP, then type "log this." The assistant writes a feedback entry; paste it into the Feedback Log (bookmarked on every front-desk computer, and linked in the assistant's reply) so Marisol, the assistant's champion, can fix it. That's how the SOPs and the assistant get better.
- **Still stuck?** Asking a person is always fine, especially about privacy or a patient who seems unwell.

Part 2: Rollout and Training Plan

Owner: Marisol Vega, front desk lead. Approved by Dana Reyes, office manager.

Who owns the assistant

The front desk lead owns the assistant, and the senior receptionist backs her up. Both duties belong to the role, not the person, so they carry over when staff change.

	Champion (owner)	Backup
Who	Marisol Vega, front desk lead	Kevin Tran, senior receptionist
Why this role	Owns training today and feels the pain most	Senior enough to know the SOPs well
Duties	Runs the training session; collects feedback on wrong answers; updates the SOPs and the assistant's files; reviews the feedback log monthly with Dana	Logs feedback and helps coworkers when Marisol is out; takes over the duties during a long absence
Time	About 30 minutes a week, paid for by the time the assistant saves her	Rarely more than a few minutes a week
Must know how to	Export an updated SOP, replace its file in the Project, and re-run the test log	The same, by following the steps in this plan and the AI Rollout Playbook

The 30-minute training session

Marisol runs it once for the whole front desk at launch, then for each new hire on day 1, after HIPAA training. Most of the time is hands-on, at the desk, with real front-desk situations.

Minutes	What happens	Why
0–5	The why: new hires take 5 weeks to work solo, and most questions are already answered in the SOPs. Hand out the quick-start guide	People adopt a tool when they see their own problem in it

Minutes	What happens	Why
5–10	Marisol demos 2 questions live: inactive coverage, and which appointment type to book	Seeing it used on a familiar task beats a feature tour
10–20	Each person works 3 scenario cards. One includes a patient's name, and they rewrite it to describe the situation instead	Practice the privacy habit before it matters
20–25	Guardrail drill: a symptom call (transfer to Nurse Santos, never the assistant) and a question the SOPs don't cover	Teach what the tool won't do, so no one is surprised
25–30	Recap the 4 rules and how to report a wrong answer. Each person says how they'd ask a question without patient details	A quick check that the key habit landed

Materials: printed quick-start guides; 10 scenario cards taken from the test log questions; access to the Project for each person.

Launch steps

Launch runs over 3 weeks, so problems surface with a small group before everyone depends on the tool.

1. **Before launch:** get sign-off from Dana, Dr. Marsh and the privacy review. Give Marisol and Kevin access to the Project, and share the Skill with them.
2. **Week 1, pilot:** Marisol, Kevin and the newest hire use it. Log every wrong or missing answer and fix the SOPs first.
3. **Week 2, everyone:** run the 30-minute session for the whole front desk. Post the quick-start guide at each station.
4. **Week 3, make it standard:** update SOP 5 so new hires learn the assistant on day 1, and change its "When you're stuck" line to: check the SOPs or ask the Front Desk Assistant first, then consult Marisol, then Dana.
5. **After that:** a monthly review of the feedback log, and a re-run of the test log after any SOP change.

Feedback loop and the time saved

The time the assistant saves Marisol goes into proactive work: being on the desk when it's busiest, and catching problems before they become fires.

The feedback loop: when an answer is missing, wrong or unclear, the assistant writes a ready-made feedback entry, and staff paste it into the Front Desk Assistant Feedback Log, a shared sheet. Marisol, or Kevin when she's out, reviews new entries each week, fixes the SOP or the assistant, re-runs the affected tests and lets the team know. Dana reviews the log monthly.

Reinvesting the time: the baseline is about 100 minutes a week of Marisol's time spent on new-hire questions. As that drops, the time goes to:

- Covering the desk from 8 to 10 a.m., the busiest check-in window, when her experience matters most
- Proactive checks each afternoon: reviewing the next day's schedule for wrong appointment types and unresolved insurance flags, so they're fixed before patients arrive
- Improving training as feedback comes in, including structuring weeks 2–5 of SOP 5 and closing the ChartWell downtime-forms gap

What we'll measure: questions to Marisol per week, weeks until a new hire works solo, how many staff use the assistant weekly, the number of SOP fixes made from feedback, and the problems prevented: insurance flags resolved before the visit and booking errors caught the day before. A real rollout would put a dollar value on each prevented denied claim and each extra shift avoided; that value comes from the clinic's own billing figures.