**FRONT DESK JOB DESCRIPTION**

* Greet CL’s coming in & always ask for their name / to write it down so you can look their file up on FV.
* **Always** ask if a team member is busy or not before transferring calls.
* Nef will not see CL’s throughout the day unless he specifically calls them to come in. When CL’s come in & ask for him let them know he’s in a meeting & that you’ll pass a message but that their case manager can help them out.
* When adjusters call with an offer amount always update it on FV.
* Leave your outlook, Gmail, open on your desktop at all the time
* First thing in the morning, check all the faxes we received after 5pm on your outlook and upload them to FV +@the case manager on every fax that comes in
* If we received invoices, try to pay them immediately and upload them to fv at the expense folder, +@case manager and let them know the invoice has been paid
* If for any reason you couldn’t make a payment for the invoice, make sure to note it down on fv that you couldn’t pay and let the case manager know
* Check the Gmail every 20 minute to see it we received more records
* Upload the records immediately and notify the case manager on fv
* If we received records by mail, make sure to prioritize medical records, total loss documents and any documents that need response form the case manager. Notify the case manager immediately
* Check smart request portal and chart swap 2,3 times day. Sometimes, we don’t get a notification on Gmail for every record that we receive and for every record that has been rejected.
* Make sure to let the case manager know when records get rejected +@case manager
* Make sure to pay the smart request portal and chart swap invoices
* Go over the faxes, Gmail, smart request portal, chart swap.  Check every 2 hours to make sure you didn’t miss any documents throughout the day
* Going to deposit checks / purchasing stamps or office supplies if needed
* Sending out Starbucks birthday cards to clients
* Sending out mail to providers / CL’s
* **Mail:** Open and review a mail. If the mail is from an insurance company, court, defense counsel, or related to the case, scan and upload it to Filevine. If it is important, please notify the attorney or case manager.
* **Settlement Check:** (1) Please scan and email it to Nef and Nancy; (2) Upload the check to the trust account folder; (3) Note it in the trust account; and (4) Deposit it into trust bank account.