

NEW PATIENT APPOINTMENT FLOW



- RDH greets new patient and build rapport.
- RDH explains how appointment will run and reviews medical history.
- RDH does necessary screening, such as: Radiographs, perio probings, intraoral photographs, etc..
- Patient is then explained their periodontal condition; if perio exists, patient is explained the condition and appropriate treatment plan.

DOCTOR NEW PATIENT EXAM



- RDH sits patient up and introduces the doctor.
- DDS greets patient and builds rapport.
- DDS reviews medical history and dental history.
- DDS does exam in the following order: Oral cancer screening, Reviews periodontal findings, and confirms Restorative exam
- DDS takes any other necessary pictures needed and requests RDH take any more necessary radiographs for treatment plan fabrication/presentation.
- Doctor does not present treatment plan at this point. Doctor explains to the patient that the hygienist will finish the cleaning and they will meet at the end to review.

Done by doctor anytime after necessary screenings are completed but prior to the last 10 minutes of the appointment.

HYGIENISTS FINISHES WITH PROPHY



- Hygienist completes treatment and any other necessary duties to get patient a complete new patient appointment, such as fluoride, home care instructions, etc.

RDH SETS APPOINTMENT



- RDH sets appoint for patient's next visit and pins it for the front office staff to schedule at the walk out.
- Any notes important for the next appointment should be entered into appointment notes, as well as later in the clinical notes.

RDH GIVES PATIENT THEIR RE CARE PACKET



- RDH gives patient their recare packet AS WELL AS SHOWS THEM THE "CARE TO SHARE" CARD and verbally tells them that the office would love any referrals or reviews.

HYGIENIST TAKES PATIENT TO THE CONSULT ROOM



- The Hygienist explains to the patient that the doctor wants to review their case with them.
- Gets any agreed-upon things during the appointment, such as literature about something they discussed.
- Says their goodbye.

COMPLETION OF PATIENT APPOINTMENT



- The Hygienist enters clinical notes per office directions.
- Changes the recare visit in patient preferences if different than 6 months.
**** Recare/perio maintenance appointments run almost exactly the same as this, with the following exceptions:*
 1. Exams only needed every 6 months, so if on more frequent maintenance, an exam not needed every time.
 2. X-rays & Perio probing to be done according to office policy.

IMMEDIATELY AFTER NEW PATIENT SAT IN CONSULT



- Treatment Coordinator goes into consult room .
- Announces they are in the consult room and reminds after a certain amount of time.
- Talks with patient until doctor arrives.

DOCTOR PRESENTATION



- As soon as doctor arrives, TX coordinator moves and lets doctor take over to allow doctor to present treatment to patient.
- TX Coordinator listens to txp for patient's needs and helps makes sure patient is understanding.
- TX Coordinator asks questions either along the way or at the end to handle any potential objections the patient might ask when doctor leaves.
- TX Coordinator takes over the control of the consult to get the doctor out.

TREATMENT COORDINATOR REVIEWS TREATMENT PLAN WITH PATIENT



- Make sure patient understands and doesn't have any questions.
- Review payment options and find out how patient wants to pay.
- Gets treatment plan signed and appoint patient.
- If the patient doesn't close and important txp, call doctor back in.
- If the patient can't pay, review/discuss financing options.

These are only suggestions. Adapt each aspect as necessary to your office's existing policies and procedures.
**** If any red flags arise during any part of this process (such as during the initial phone call, verifying insurance, confirming patient, or finding patient if late), the office manager needs to be notified immediately.