NEW PATIENT CHECKOUT FLOW

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CLINICAL TEAM FINISH APPOINTMENT AND GET READY FOR HANDOFF

- Complete today's appointment and review home care instructions.
- Dental assistant confirms next step with treating doctor and reviewed with patient.
- If consult notes show they are on board and today's discussion confirms that, then next appointment is pinned for the walk out.
- Even if patient is on board for next step, doctor must verbalize the importance of the next appointment to the patient, to include perio maintenance and recare.
- If patient was not fully closed for the next step in the treatment plan, then treating doctor reviews again with patient and treatment coordinator in consult room.
- Walk patient to treatment coordinator in consult room, if patient not fully closed. (Consultation policy steps are followed again to ensure patient gets closed on next step.)
- Walk patient to scheduler, if patient is on board and fully closed for next appointment

SCHEDULE NEXT APPOINTMENT - EVERY PATIENT LEAVES WITH NEXT APPOINTMENT

- Complete appointment for today in order to know how much is owed for today's visit
- Patient pays for their portion of today's procedure as well as any outstanding balance.
- Schedule their recare/perio appointment and/or their next appointment for dental work.
- If a patient does not appoint, then employee doing the consultation needs to set follow up game plan with patient with the intention to get them to schedule in the near future.
- Notes need to then be put into the patients chart as to the follow up agreement and the reason the patient did not schedule.
- Make sure to schedule follow up tasks and add them to task list.

FOLLOW UP TO GET UNSCHEDULED PATIENTS TO SCHEDULE

- If an employee other than the treatment coordinator did the consultation, the data re: the unscheduled patient needs to be transferred to the treatment coordinator
- Patients with unscheduled treatment need to be put on the unscheduled txp list to monitor and ensure they get scheduled.
- Treatment coordinator then follows office policy in order to attempt to get the patient to schedule
- When patient schedules the unscheduled treatment, financials need to reviewed and payment amount confirmed with patient

FINANCIALS AND APPOINTMENT CONFIRMED

- When making confirmation calls, review if financials are worked out and remind patient of details.
- Review patient's account balance and verify if any additional money will need to be collected and/or claims to be followed up.
- Complete necessary steps to ensure account is up to date and notes are in appointment about financials discussed and confirmation of patient arriving.
- Call/text/email as many times as necessary to ensure patient is showing up.

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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.