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ROCK STAR FRONT OFFICE TRAINING

SCHEDULING NEW PATIENTS

01 CREATE AN APPOINTMENT

- Schedule new patient (done by staff who is trained to handle call.)
- Completely handle the phone call. (This includes building rapport with patient, handle all questions they have, get all their contact information, tell them about our office and about how to fill out new patient forms, make sure they have directions, etc.)
- Important highlights are: Make sure to get email address & cell phone for Revenuewell communication.
- Find out if they have insurance and get pertinent information so the office can verify it.
- Repeat day and time of their appointment so you are sure they have it correct.
- Ensure the patient knows to fill out new patient paperwork ahead of time or knows to arrive 15 minutes early.
- Enter referral information (how they heard about office).

02 CAPTURE PATIENT INFORMATION

- Completely enter new patient information into software and add to new patient list (handled by the person who answered the phone call.)
- Enter all patient information, ESPECIALLY email and cell phone.
- Enter all insurance information. (It's vital to get insurance company, employer, group number, social security number/ identification number, and the policy holder. If they are not the policy holder themselves, then also get their date of birth and their SSN or ID number.)
- Enter any notes on the patient in the appointment screen.
- Capture notes about preferences they have with their appointment times/days of week.
- Take any personal notes about them that they told you.

03 VERIFY INSURANCE

- Verify insurance within 24 hours of scheduling the patient (completed by receptionist, insurance coordinator or person that handled call.)
- Call insurance and attempt to get EVERY QUESTION answered on the benefits breakdown form.
- If there is a red flag with the insurance (e.g., they can't find the patient, they don't have coverage any longer, the insurance won't work in our office), get back in touch with the patient to discuss the situation with them. ALWAYS OFFER NEW PATIENT SPECIAL to the patient in the hope that they won't cancel the appointment based on insurance not paying for their treatment.

04 ENTER INSURANCE DATA

- Enter insurance information into patient chart correctly (completed only by someone who is completely trained on this task.)
- Make sure the correct insurance plan is attached to this patient.
- Make sure they are correctly marked as the policy holder on insurance.
- Lower % covered if they don't match standard % in the software.
- If insurance downgrades, lower the % by 15% more to make sure the system estimates lower.
- Check that deductible, maximums, etc., are correct for their plan.
- Update remaining benefits if it is different from what is in the system.
- Enter the insurance notes into the insurance section.
- SCAN benefits breakdown form into patient chart.

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These are only suggestions. Adapt each aspect as necessary to your office's existing policies and procedures.