



## NEW PATIENT ROUTING

Patient Name: \_\_\_\_\_ Date: \_\_\_\_\_

### 1. Receptionist

- Greets patient, welcomes them to the practice, has them sign in
- Verify insurance coverage
- Make photocopy of insurance card and retain Master copy of insurance form, if applicable.
- Enter new patient information into computer or manual system.
- Place yearly code label on treatment record.
- Note referral source on new patient chart; Note referral on referral source chart and send appropriate referral acknowledgment.
- Complete patient record, type label, affixed a record, medical alert noted and quick claim form attached.
- Informs the treatment coordinator patient has arrived

### 2. Treatment coordinator

- Greets the patient and escorts to consultation room
- Establish rapport and inform of doctor's qualifications
- Take blood pressure and complete Health History Questionnaire
- Ask questions on "Dental Profile"
- Explain how insurance works

and appointment guidelines.

- Inform assistant/hygienist patient is ready for x-rays.
- Optional:** Call patients other medical provider if info needed regarding patient's health history

### 3. Doctor

- Review health history and dental history and blood pressure
- Conduct initial screening exam and order necessary x-rays and study models if indicated.

### 4. Hygienist

- Expose, process, and mount radiographs
- Take impressions for study models, if applicable.
- Takes 4 oral camera shots of possible problem areas and reviews with patient.
- Doe perio probing
- Gives patient reading materials and informs them they will be back in three to four minutes
- Retrieve x-rays and mount on view box
- Inform doctor and treatment coordinator patient ready for clinical exam

**5. Doctor/Treatment coordinator**

- ❑ Perform clinical exam
- ❑ Treatment coordinator enters information into the chart
- ❑ Treatment coordinator transfers the recommended treatment plan from the chart to the treatment plan in patient terminology
- ❑ TX Coordinator helps doctor by asking questions and reinforcing doctor's statements
- ❑ Doctor asks patient if they knew they have dental disease
- ❑ Doctor presents treatment plan and educates on next phase of disease if untreated
- ❑ Gets patients commitment to correct each area found before explaining next condition
- ❑ Informs patient the treatment coordinator will go over all treatment needed and the costs involved

**6. Treatment coordinator**

- ❑ Once in the financial arrangement room ask the patient if they fully understand the treatment that doctor is recommending and why they need it.
- ❑ the treatment explain using pictures and the Casey system
- ❑ Go over the whole treatment plan and cost for each portion
- ❑ Explain approximately how many visits it will take and the total patient portion (if insurance) and that this is strictly an estimate.
- ❑ Explain payment options: pay upfront, use credit cards, used a premium company such as Norwest, pay-as-you-go.
- ❑ Give a copy of the treatment plan to the patient to sign and bring them to the scheduling coordinator for the next appointment.

**7. Scheduling coordinator**

- ❑ **Schedule the patient for the next visit based on information from the treatment coordinator.**

