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New Patient Flow Chart

. Receptionist (phone)
- ❑ Complete new patient phone questionnaire.
- ❑ Patient to download forms from Web Page
- ❑ Verify patient insurance

. Receptionist-In Office Procedure
- ❑ Greets patient, welcomes them to the practice
- ❑ Make photocopy of insurance card
- ❑ Enter new patient information into computer.
- ❑ Note referral source on new patient chart and computer.
- ❑ Informs the TX Coordinator patient has arrived
- ❑ Fill out insurance benefits form

Treatment coordinator
- ❑ Greets the patient and escorts to consultation room.
- ❑ Establish rapport and inform of doctor's qualifications, philosophy.
- ❑ Go over papers signed so far.
- ❑ Get to know you Questionnaire
- ❑ Inform assistant/hygienist patient is ready for x-rays.

.Hygienist
- ❑ Blood pressure
- ❑ Health History
- ❑ Take digital X Rays
- ❑ Takes 4 oral camera shots of possible problem areas and reviews with patient.
- ❑ Inform doctor patient ready for clinical exam
- ❑ List obvious treatment already discussed.

Doctor/Hygienist
- ❑ Review Health History & Dental Profile
- ❑ Perform clinical exam
- ❑ Hygienist enters information into chart
- ❑ Hygienist transfers the recommended treatment plan from the chart to the treatment plan in patient terminology
- ❑ Hygienist 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 TX Coordinator will go over all treatment needed and the costs involved

OR- <u>Tells patient they need to come back for a consultation.</u>

Treatment coordinator- (financial arrangements)
- ❑ Ask the patient if they fully understand the treatment that doctor is recommending and why they need it.
- ❑ If they are unsure why they need the treatment explain using pictures and other visual aids
- ❑ 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 Care Credit, pay-as-you-go.
- ❑ Give a copy of the treatment plan to the patient and bring them to the accounts manager & scheduling coordinator for the next appointment.

Accounts Manager
- ❑ Payment

. Scheduling coordinator
- ❑ Schedule the patient for the next or series of visits based on information from the treatment coordinator.