# New Patient Flow Chart

## New Patient Call
- Find out their name and introduce yourself
- Build rapport, find out how they heard of your office, schedule ASAP
- Handle office requirements (i.e. New Patient Paperwork)
- Enter notes for patient arrival and add to call in tracking sheet
- Verify insurance, if office requires or patient requests

## Confirm Appointment
- Use office policy or resources to confirm patient appointment
- Make sure patient has all they need to arrive (i.e. directions, correct appointment time, etc.)

## Morning Huddle
- Review information regarding patient
- Review where the patient was referred from

## New Patient Appointment
- Greet patient - stand up, shake their hand, introduce yourself and welcome them to the office
- Handle office requirements (i.e. New Patient Paperwork)
- Build rapport with the patient while they wait
- Do whatever is needed to help get the patient seated on time

## New Patient Exam Protocol
- Clinician should review the patient information and build rapport
- Follow the New Patient Protocol of the office (i.e. exam, radiographs, cleaning)
- Doctor determination of patient needs and treatment plan

## Consultation
- Present treatment plan to patient and hand their questions and concerns
- Handle insurance questions and financials
- Determine how patient will pay or follow up with a payment agreement

## Scheduling and Check Out
- Get the patient scheduled ASAP for their treatment and/or next recare
- Follow the office check out process for that appointment
- Inform the patient of your referral program or welcome them to review your office online after their visit