

STARTING TREATMENT CHECK OFF LIST

Patient Name: _____

- Patient Information entered into computer system
- Insurance Verified \$_____
- Transferred Records Requested Transfer Records Received
 Date: _____ Date: _____

- Credit Report
- Exam Completed
 - Thank You Note to Patient
 - Thank You Note for Referral
 - Patient Placed on Recall Date: _____
- Records Completed
 - Panorex
 - Models
 - Ceph
 - Photographs
- Chart Prepared and Verified for contents
- Model # given and recorded
- Doctor Reviewed Records/Developed Treatment Plan
- Consultation
- Contract Signed
- Next Visit Scheduled Date: _____
- Separators Placed if indicated
- Contract Entered into System
- Office Policies Reviewed
- Consent Form Signed
- Insurance filed
- Letter to DDS on Treatment Plan
- Extraction Order or Work Order completed and mailed with panorex
- Verify all information has been placed in the computer system
- Verify patient treatment card is filled out and ready for the clinical team
- File the chart in the "Active File"

**NEW PATIENT COORDINATOR
INITIAL EXAM, RECORDS AND CONSULT
CHECK-OFF LIST**

- Confirm Appointment
- Review Patients information prior to the exam
- Exam Room & paperwork prepared for the new patient
- Verify insurance benefits and run a credit report
- Meet and greet the new patient/parent
- Take on tour- brag about the doctor/team members/facility
- Take panorex and or digital photographs
- Review medical/dental history form
- Write down chief concerns & referrals if not listed
- Explain exam process and same day records
- Assist doctor during exam
- Take notes and write tentative treatment plan
- Review exam findings once the doctor leaves
- Show appliance examples or review process on CD ROM
- Discuss financial options and or insurance benefits
 - € Review next steps and see if patient wants to proceed
 - € Last prophylaxis with DDS
- Give exam packet to take home
- Diagnostic records taken
- Records reviewed and treatment plan developed
- Findings reviewed with patient/parent/importance of retention
- Review patient cooperation/oral hygiene/keeping DDS appt.
- Office policies reviewed and signed
- Contract established and signed
- Separators Placed
- Schedule Start appointments
- Treatment letter to DDS
- Work order or extraction order to DDS with Panorex and photos
- Thank you note to patient and referral source