Get people in faster with a new patient exam

Initial Patient Contact → Patient Type Determination

Emergency Appointment
- Prioritize immediate scheduling based on urgency.

Hygiene Appointment
- Check hygiene schedule for openings.
- If full, recommend a new patient exam with the dentist and assist

New Patient Exam (Comprehensive or Limited):
- Schedule as soon as possible to secure patient commitment.

Key Communication Points:
- Explain benefits of a new patient exam.
- Highlight the ability to create a tailored treatment plan.
- Emphasize importance of record-taking for future hygiene visits.

Scheduling the Appointment → Time Slots Determination

Preferred Time Slots:
- Early morning or post-lunch slots for promptness.
- Reserve ‘ghost columns’ or ‘second columns’ for flexibility.

Assistant Preparation:
- Assign a rover assistant for efficient record collection.
- Allocate space in the assistant’s schedule for X-rays, charting, and records.

New Patient Exam Procedures → Comprehensive Patient Care

Record Collection:
- Obtain medical history.
- Take necessary radiographs (panorex, X-rays).
- Capture intraoral photos.
- Update dental charting.

Patient Interaction:
- Address chief concerns.
- Educate using intraoral photos.

Treatment Plan Development:
- Chart findings and prioritize treatment needs.
- Formalize treatment plans using practice management software.

Communication of Next Steps → Effortless Patient Support

Insurance Coordination:
- Treatment coordinator to verify benefits and provide cost estimates.
- Offer pretreatment estimates for patient review.

Scheduling Follow-Ups:
- Encourage scheduling of follow-up appointments (e.g., hygiene or restorative care).
- If undecided, note to follow up within three weeks.

Financial Discussions:
- Offer second consultations for detailed fee discussions if necessary.
- Initiate immediate treatment for urgent cases or low-cost procedures.

Comprehensive Exam Outcomes → Care Coordination

Records and Insights:
- Provide complete records for hygienist’s use.
- Outline treatment plans with service codes and fees.

Patient Education:
- Use intraoral photos and findings to explain dental health.

Follow-Up Planning:
- Ensure smooth transition to next appointments.
- Establish a long-term care relationship.

Fee Structuring and Documentation → Service Fees and Patient Follow-Up

Set fees based on services performed:
- X-rays, periodontal probing, or limited exams.
- Record additional charges for subsequent procedures if required.

Final Patient Communication:
- Reassure patient of next steps.
- Confirm follow-up appointment details.

Monitoring and Optimization → Streamlining Schedules and Communication

- Regularly review assistant and dentist schedules for efficiency.
- Maintain open communication channels with patients regarding insurance and treatment plans.
- Use patient feedback to refine processes for enhanced experiences.