Appointment Sequence for General Practice Protocol

**Front Office Intake**

* COVID screening
* Review/input data from patient forms
* Prepare/update chart
* Discuss expectations for today’s appointment
* Collect any co-pays/fees required

**Before the Doctor enters the room**

* Seat the patient on time.
* Take and chart the patient’s chief complaint.
* Review the patient’s health history and medication list.
* Pull up the patient’s images or take any needed scans or images.
* Ensure the doctor has easy access to the chart, images, health history, etc.

**When the Doctor enters the room**

* Introduce the doctor to the patient.
  + For returning patients, you might say, “You remember Katerina.” or “Katerina is back to see us.”
  + For new patients, you might say, “This is Katerina’s first visit to our office.”
* State when the patient was last in your/another office.
* Call the doctor’s attention to any special circumstances (e.g., serious medical conditions, medications, or patient demeanor). For example, you might say, “Katerina let me know she’s pretty nervous today, but I told her we’ll take great care of her.”
* Reiterate any concerns the patient mentioned during intake, and restate your response to the patient concern. For example, you might say “Katerina is having some pain on the upper left. I took and x-ray and let her know that after today’s exam, you’ll let her know what treatment is needed and when it should be done.”

Under normal circumstances, the entire handoff should take about 30 seconds. Here is an example of a full handoff script:

* “Hi, Dr. \_\_\_\_\_, I’d like you to meet Katerina. She was in another doctor’s care a year ago but hasn’t seen anyone recently. She has some pain on the upper left and I took an x-ray. I let her know that in today’s consultation, you will explain what treatment is needed and when it should be done.”

**While the doctor examines the patient**

Complete the patient administration by notating the following information on the patient’s chart:

* The exam results
* The diagnosis
* The treatment plan
* The appointment time needed for the procedure

**The doctor addressing the patient**

* Share images
* Share diagnosis
* Inform this is a progressive condition, and early treatment will reduce pain, cost, need for additional treatment
* Share treatment option
* Encourage treatment today or soon
* Please note, for a returning patient who is completing treatment, the doctor must highlight the next procedure or phase of treatment, along with the urgency in getting it scheduled!

**Before the doctor leaves the room**

* Get any necessary prescriptions signed
* Receive charting approval
* Receive treatment code approval
* Receive approval on the cooperative care letter

**When the doctor leaves the room**

* Complete any additional patient education regarding the procedure.
* Address pre/post-treatment care instructions and provide them in writing.
* Get the patient’s signed consent.

**Handoff to front office**

* When handing off to a treatment/financial coordinator:
  + Use a router/code sheet to ensure that the treatment coordinator has the correct treatment codes to prepare and present the treatment plan.
  + Hand off the patient to the treatment coordinator using the following format:
    - “Hi Wendy, this is Katerina. She met with Dr. \_\_\_\_\_ and discussed that she needs a root canal and crown. Dr. \_\_\_\_\_ would like to get this taken care of right away. I let her know that you would discuss the treatment plan with her and get the procedure scheduled as soon as possible.”

**Treatment Coordinator**

* Prepare and present the treatment plan.
* Address insurance coverage, the patient portion, and the payment schedule.
* Get the treatment plan signed.
* Get the financial agreement signed.
* Schedule the appointment.
* Take any required deposits.

It is important to remember that addressing these points in sequence and with proper attention to detail streamlines our office processes and makes our patient visits more efficient. When we are more efficient, our patients are happier.