Appointment Sequence for Specialty Practice Protocol

**Before the Doctor enters the room**

* Seat the patient on time.
* Take the patient’s vitals.
* Take and chart the patient’s chief complaint.
* Review the patient’s health history and medication list.
* Input the patient’s preferred pharmacy name and location.
* Pull up the patient’s referral.
* Pull up the patient’s images or take any needed scans or images.
* Ensure the doctor has easy access to the chart, images, referral slip, 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 the office or the name of their referring doctor and when they were last seen in that 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 “I let Katerina know that in today’s consultation, you’ll let her know what treatment is needed and when it should be done.”
* Provide a general assessment of overall oral health. For example, you might say, “Katerina’s situation is pretty good overall. She uses a Waterpik and gets good results, but I’ve recommended more flossing in this area/mouthrinse to help with that concern.”

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 referred to us by Dr. Smith and was seen in his office last week. Dr. Smith let us know that tooth #13 is fractured at the gum line and needs to be extracted. He asked that you evaluate the x-ray he sent over to see if Katerina is a candidate for a bone graft and implant. 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 implant system that will be used
* The appointment time needed for the procedure
* The anesthesia increments for the procedure
* The treatment plan

**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-operative care instructions and provide them in writing.
* Get the patient’s signed consent.

**Conditional processes**

* When handing off to a treatment 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 an extraction, bone graft, and implant. 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.”
* When completing the process yourself:
  + Prepare and present the treatment plan.
  + Address insurance coverage, the patient portion, and the payment schedule.
  + Get the treatment plan signed.
  + Schedule the surgery and post-op appointments.
  + Take any required deposits.

It is important to remember that this type of handoff to the doctor streamlines our office processes and makes our patient visits more efficient. When we are more efficient, our patients are happier.