ePRACTICE MANAGER

Patient Intake

When completing the intake process for a new patient, use the following steps:

Step	Action
1	Thank the patient for reaching out to the practice and let them know you are going to help them.

2	Ask the patient the following set of questions:
	• Who referred you to our office?
	    ○ When was the referral made?
	    ○ What was the referral for?
	• Are you experiencing pain or other symptoms related to this condition?
	• What are you looking to accomplish with a visit to our office? (Try to steer the conversation towards scheduling a consultation or note if the patient needs immediate emergency care.)

3	Explain the consultation process including images, exam, diagnosis, treatment plan, and discussion of fees and insurance coverage.
4	Per protocol, ask any questions necessary related to medications and general health conditions.
5	Answer any questions regarding fees and insurance, and ensure patient understands the cost of the consultation and/or how the need for images or immediate treatment may affect that cost.
6	Explain that patients referred with this condition should be evaluated as soon as possible to immediately address the issue before impaction, infection, or other teeth are affected.
7	Schedule the appointment.
8	Gather current insurance information.
9	Make arrangements for the patient to complete their intake forms in advance of the appointment.