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The Leader in Dental Front Office Solutions & Training

Next Day Reviewer – Treatment Coordinator

The purpose of reviewing the schedule a day ahead is to make sure that we maximize tomorrow and we do all we can today to make it run smoothly. The first step is to print a copy of the schedule for tomorrow. As things are verified, notes should be added to the notes portion of the appointment (lower box in appointment screen).

Once you have reviewed all of the data for patient, cross their appointment off on the printed schedule, showing what has been verified at any given time.

There are a few things that the review needs to look for when reviewing the schedule:

Does Patient Need to Premedicate?

Do We Need a Medical History Update?

Are All Appointments Accurate?

- Make sure they are scheduled for everything correctly, be it Perio therapy, Perio Maintenance, Prophy, Exam
- If they are due for x rays, please make sure if they are a cash patient, that the cash x ray code is used.
- Does the patient have any outstanding treatment?
- Does the patient have more than one appointment scheduled today?

Do They Have Any Outstanding Lab Cases – Are They Here?

- If a Lab Case has been sent out for this patient, then we need to verify it is here for tomorrow's appointment. If it is here then notes can be put on the schedule that lab case is in
- If it is not here then a phone call needs to be made to the laboratory it was sent to to find out the status of when we will expect it in the office, we can also check with the assistants. The scheduler needs to be notified immediately if the case is not here and the appointment needs to be moved.
- For cases done in house, such as whitening trays, if they are not done then there needs to be some verification of who's responsibility it is to finish them and to verify that they will be done in time.

Have They Made Any Referrals to Us? / Do They Have Family Members Not Coming Here Yet?

- This can be verified by looking in the family file and selecting the referrals made button which is the little blue guy with arrows pointing away from him. This will list referrals they have made to our office and what thank you gifts we have sent them. It is important to recognize patients that have referred because they are more like to refer again in the future.

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- This time you should also look to see if the entire family comes here as patients. It is important to note if they have someone in the family that does not so we can ask them about that at their appointment tomorrow.

Do They Owe Any Money After Claims Being Paid?

- By looking in the ledger for the patient, you can see the claims that have been sent out and received. If all of the insurance claims say received but there is a balance at the bottom of the ledger, the name and amount should be given to the appropriate person in the office to review prior to the appointment tomorrow.

If Child – Are Sealants/Fluoride Covered?

- This can be done by calling the insurance company listed in the family file to verify the coverage. Once it is verified then it can be added in the notes.

Have They Been Referred Out To Any Specialists – If So Did They Go?

- This can be verified by reading notes to see if they were referred out and then the outcome of the referral if they went. Two places to look for this information is in the chart notes and in the scanned documents for the patient under correspondence.
- If there are no notes on whether they went to the referral doctor the next step would be to call the office to see if they have notes on the patient and what happened.