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Appointment Confirmation Verification Policy

When confirming appointments, there are a few things that you should review prior to making the phone call and update in the notes if needed.

New Patients Only

New Patient Forms Complete?

- You can remind the new patients during the phone call that they can do their paperwork prior to their appointment by going to our website and selecting New Patient Forms or they need to come 10-15 minutes prior to their appointment to fill them out.

X-rays received:

- If the patient mentioned that they were having x-rays transferred to our office, check to see if they have been received and make a note in the appointment block identifying where the x-rays can be found.

All Existing Patients

2 Appointments on the Same Day:

- When confirming patients, make sure they do not have another appointment on the same day. If they do, make sure to confirm them for the earliest appointment and remind them that they have both appointments that day.
- Also double check someone else has not already confirmed them.

Other Family Members on the Same Day:

- When confirming patients make sure to see if they have other family members coming on the same day. If they do, then you can confirm all the family at the same time and not have to call them back multiple times.

Pre-Medicare:

- In the case that a patient needs to premedicate for an appointment, look for the pill in the appointment block. The pill does not always mean they need to premedicate; however, it should be checked prior to making the confirmation call and if it is a reminder to premedicate - you should make sure to remind the patient of that during the confirmation call.

Eligibility:

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- In some cases it is possible to verify eligibility and/or remaining insurance for patients by selecting eligibility button in their file. Prior to confirming the patient, check eligibility to see if there are any red flags that you might need to cover with the patient during the call, such as no benefits left and the patient will need to pay out of pocket or they no longer have that insurance and we need the new one to verify.

Collect Family Balance

- If the patient and/or family has an outstanding balance this should be reviewed with them, if they are not already aware and prepared to pay. Review the notes to determine the status with their balance and handle accordingly on the phone call.

Verify They Are With Preferred Provider or They Are Aware:

- Some patients have a preferred provider they want to stay with. Check to see if anything pops up to let you know this. If they are not seeing the preferred provider for this appointment and there is no way to switch them so that they can at the same day and time then let them know.
- If the patient won't see the provider assigned to this appointment then move their appointment accordingly. If the patient is fine to see this provider then make a note in the appointment notes so that everyone else on staff knows that it has been addressed.

Correct Procedures and Provider:

- Verify that procedures in the appointment are correct with what should be done at that appointment as well as the correct provider is assigned to that appointment.

Outstanding Treatment

- Check for any outstanding treatment and if so, make it known in the huddle so everyone is prepared to sit back down with patient to review if necessary.

Hygiene/Perio Patients

Update Medical History

- We need to have an updated medical history form from existing patients once a year, so if it is determined that this needs to be done then ask the patient to arrive at least 5-10 minutes early to complete that.

Eligible for FMX?

- The next day reviewer should have determined if the patient is due for and eligible for an FMX. In the case that the patient is 1) make sure that it is marked in the appointment with clear notes and added to the procedures to be done that day 2) see if there is a way to make the appointment 90 minutes instead of normal 60 minutes by moving patients up or down accordingly.

Doctor Patients:

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Lab Cases:

- If this appointment needs to have a lab case completed in order to see this patient, ensure prior to calling the patient that the lab case is in and completed. This can be done by checking the vile in the appointment screen: Full vile means lab case is in and ready. If still concerned, check with dental assistant.

Pre-Paid

- In some cases patients wanted to prepay and/or we wanted them to prepay to ensure that they will arrive to the appointment. Read the notes in appointment screen and consultation notes in the chart to determine if a reminder of our prepayment policy needs to happen during the confirmation call.