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Returning Visit Workflow
(With Insurance)

Patient Check In

FRONT DESK ADMIN

1. Change patient's **Appointment Status** to **Here**.
2. Update/collect missing patient information (scan documents if any).
3. Collect pre-payment. Walkout Statement provided at the end of appointment.
4. Print **Route Slip.**
5. Change **Appointment Status** to **Ready**.

During the Appointment

STUDENT

6. Receive notification that patient is **Ready**.
7. Bring patient in and seat them in the chair.
8. Change **Appointment Status** to **Chair**.
9. Review **Medical History Form** with patient.
10. Proceed with **Tx Plan**.
11. Complete **Clinical Note**.
12. **Request Approval for procedures** completed today.

FACULTY

13. Approve procedures, reviews/signs student notes, and Medical History.

STUDENT

14. At the end of appointment, **requests appointment time** for patient's next visit (if procedures were started but unfinished today, next visit is still the same procedures as today).
15. Change **Appointment Status** to **Checkout**.
16. Complete **self-evaluation** using sessional form.

FACULTY

17. Faculty **completes sessional evaluation** form for student.

STUDENT

18. Direct patient to Front Desk.

Patient Check Out

FRONT DESK ADMIN

19. Receive notification that appointment is in **Checkout**.
20. Confirm all procedures have been posted for the appointment (Completed and Tx Plan).
21. **Create Pre-authorization** for next visit. Review information and include attachments if required.
22. **Submit or Print** Pre-authorization and attachments**.**
23. Review and approve **Appointment Request**.
24. Schedule **Recare**.
25. Create claims using **Patient Walkout**.
26. If pre-payment was collected, apply payment, and collect remaining balance if any.
27. Provide **Walkout Statement**.
28. Change **Appointment Status** to ✓ Complete.