

## First Visit with Tx Planning 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 intra and extra oral exam.
11. Start **Clinical Note** for today.
12. Proceed with perio exam.
13. Acquire patient radiographs and images.
14. Chart **Existing Procedures, Conditions, and Planned Treatment Procedures** on the odontogram.
15. Build Treatment Plan cases from **Tx Planner**.
16. For each **Case**, split procedures into separate **visits** (if necessary) and specify visit **duration**.
17. Request for **Treatment Plan Approval** from Faculty.

#### FACULTY

18. Review and approve Treatment Plan.

#### STUDENT

19. Present Treatment Plan to Patient.
20. Patient consents to Treatment Plan and **signs** electronic consent form.
21. If there is time and if the patient consents, student will begin to perform initial part of Treatment Planned procedures (**Visit 1**).
22. Complete **Clinical Note** for today's appointment.
23. **Request Approval for procedures** completed today.

#### FACULTY

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

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**STUDENT**

25. Add **New Recare** and **requests appointment time** for patient's next visit (if procedures were started but unfinished today, next visit is still **Visit 1**).
26. Change **Appointment Status** to **Checkout**.
27. Complete **self-evaluation** using sessional form.

**FACULTY**


28. Complete **sessional evaluation** form for student.

**STUDENT**

29. Direct patient to Front Desk.

## Patient Check Out

**FRONT DESK ADMIN**

30. Receive notification that **Appointment Status** has updated to **Check Out**.
31. Confirm all procedures have been posted for the appointment (Completed and Tx Plan).
32. Provide patient with signed **Patient Consent Form** from Tx Planner.
33. **Create Pre-authorization** for next visit. Review information and include attachments if required.
34. **Submit or Print** Pre-authorization and attachments.
35. Review and approve **Appointment Request**.
36. Schedule **Recare**.
37. Create claims using **Patient Walkout**.
38. If pre-payment was collected, apply payment, and collect remaining balance if any.
39. Provide **Walkout Statement**.
40. Change **Appointment Status** to  Complete.