

## Front Desk Appointment Workflow (Without Insurance)

### Creating Patient and Appointment

#### FRONT DESK ADMIN

1. Patient calls to book an appointment -> Check if patient exists in the system.
2. If patient does not exist, create **new patient** and **new appointment**
  - a. Collect **Primary Contact Information** or **Preferred Contact Method**.
3. If patient exists, select patient and check **Patient Appointments** for **Missed Appointments** or **Appointment Requests** to schedule.
  - a. If no appointments exist, create new appointment and check for visits to add to appointment using **Add Tx Planner**.
    - i. If there is no treatment to attach, enter a **reason** for the visit or **procedure** code if applicable.
4. Send electronic forms request for patient to complete prior to appointment.
  - a. Send additional paperwork and consent if necessary.

### Appointment Confirmation

#### FRONT DESK ADMIN

5. Confirm patient appointments two days before scheduled date using **Unconfirmed Appointments** list.
6. Confirm **Patient Forms** were filled and enter information in Axiom Ascend.

### Patient Check In

#### FRONT DESK ADMIN

7. Patient arrives -> Change **Appointment Status** to **Here**.
8. Update/collect missing information (scan additional documents if any).
9. Collect pre-payment amount if patient prefers to pre-pay. Let them know walkout statement will be provided at the end of the appointment.
10. **Print Route Slip** (if not printed the day before).
11. Change Appointment Status to **Ready**.

### Patient Check Out

#### FRONT DESK ADMIN

12. Receive notification that **Appointment Status** has updated to **Checkout**.
13. Confirm procedures have been posted for the appointment (Completed and Tx Plan).
14. Provide patient with signed **Patient Consent Form** from **Tx Planner**.
15. Review and approve **Appointment Request**.
16. Schedule **Recare**.
17. If pre-payment was collected, apply payment, and collect remaining balance if any.
18. Provide **Walkout Statement**.
19. Change **Appointment Status** to “ Complete”.

### End of Day

#### FRONT DESK ADMIN

20. Check **Appointment Request** report for list of remaining appointments to approve.
21. **Print Next Business Day** Route Slips.
22. Perform **Appointment Confirmation** steps (steps 5-6).