Ph: 1-888-808-6223
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1963 Lougheed Hwy, Coq, BC, Canada V3K 3T8

Front Desk Appointment Workflow (With 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 Axium Ascend.
7. Verify insurance eligibility using **Insurance Eligibility** report.
   a. If ineligible or self-pay, end insurance.
8. Check pre-authorization response from patient's **Insurance Claims** list or **Tx Planner**.
   a. If rejected, make necessary changes and resubmit.
9. Confirm procedure coverages are correct, if not, enter **Insurance Estimate Overrides** for procedures.

Patient Check In

FRONT DESK ADMIN

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

Patient Check Out

FRONT DESK ADMIN

15. Receive notification that **Appointment Status** has updated to **Checkout**.
16. Confirm procedures have been posted for the appointment (Completed and Tx Plan).
17. Provide patient with signed **Patient Consent Form** from **Tx Planner**.
18. **Create Pre-authorization** for next visit. Review information and include attachments if required.
19. **Submit or Print** Pre-authorization and attachments**.**
20. Review and approve **Appointment Request**.
21. Schedule **Recare**.
22. Create claims using **Patient Walkout**.
23. If pre-payment was collected, apply payment, and collect remaining balance if any.
24. Provide **Walkout Statement**.
25. Change **Appointment Status** to "✓ Complete".

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End of Day

FRONT DESK ADMIN

26. Use **Create Claims** report to create claims for any missed procedures.
27. Review and edit created claim information using **Unsent Claims** report. Attach documents if required.
28. Submit or print claims.
29. Check **Appointment Request** report for list of remaining appointments to approve.
30. **Print Next Business Day** Route Slips.
31. Perform **Appointment Confirmation** steps (steps 5-7).