

New Patient Exam Flow Chart

Patient Name: _____ Date: _____ Initials: _____

I. Introduction

- Name and Position
- Welcome
- Explain today's visit and verify time constraints

II. Fact-Finding

- Chief Complaint/Concern/Desire
- Medical History Review
- Dental Questionnaire
- X-rays Taken
- Intraoral Camera Tour and Pictures (while xrays develop)
 - Full Smile
 - Upper Arch
 - Lower Arch
 - Full Face
 - Any Problem Areas
- X-rays mounted and Visual Aids Readied

III. Doctor Handoff

- Introduce (and let him/her build personal rapport)
- Information Handoff

IV. Doctor: Explanation of Exam Process and Permission Statement

V. Assistant-Directed Exam

VI. Doctor: Presents Treatment (Assistant gets copy to Fin. Manager) or asks for consult appointment

- Present Treatment (Focus on Benefits)
- Summarize by Treatment
- Prioritize
- Ask Closing Question
- Handle Objections (Using Feel, Felt, Found)

VII. Handoff to Financial Manager (initiating Fin. Manager's Checklist)

VIII. Handoff to Appointment Manager