

Routing Form

Patient Name: _____ Date: _____

1. RECEPTIONIST

- a. Greets patient _____
- b. Ensure that all necessary forms filled out _____
- c. If not done so already, get copies of insurance card and driver's lincense _____
- d. Verify home/work address, phone number and email _____
- e. Inform Hygienist/Doctor/Assistant that patient arrivied and RS in the bin _____

2. Assistant

- a. Greets patient and brings patient into the operatory _____
- b. Change location on computer _____
- c. Take x-rays if needed/ or sets up for procedure _____
- d. Informs Hygienist/Doctor that patient is ready _____

3. HYGIENIST

- a. Greets patient and updates medical history _____
- b. Does charting _____
- c. Does perio charting _____
- d. Writes a preliminary Tx plan for doctor _____
- e. Give OHI oral hygiene instructions _____
- f. Informs assistant to go get Dr. for an exam _____

4. DOCTOR

- a. Introduces self to patient _____
- b. Addresses patient's chief complaint _____
- c. Does exam _____
- d. Completes treatment plan and asks assistant to enter in softdent _____
- e. Reviews treatment with patient _____
- f. In the routing form write NV and time required and also write Pre-Ds _____
- g. Route patient to FC with Routing slip for financial arrangement _____
- h. If patient does not have to see FC route to Scheduling Coordinator for NV _____

5. ASSISTANT

- a. Take any additional x-ray if required as per Dr. _____
- b. Enter Tx plan in softdent _____
- c. Make sure routing form is filled by Dr. _____
- d. Move patient to FC/Scheduler as per Dr's instruction _____

If Dr. decides to start Tx set-up for procedure

6. DOCTOR

- a. Does treatment if decided to start
- b. Have assistant take necessary x-rays
- c. Fills out lab slips
- d. Route patient to FC/Scheduler

7. FINANCIAL SECRETARY

- a. Make sure treatment plan is entered in Softdent
- b. If not enter the required procedure for NV
- c. Go over the Tx with the patient
- d. Closes patient and collects
- e. Re-route the patient and RS to the scheduler

8. SCHEDULER

- a. Reviews Tx plan from softdent
- b. Reviews time needed from the routing slip
- c. Make appointment from softdent Tx plan by groups
- d. Makes recall appt
- e. Fills out the recall appt date on the recall post card
- f. Makes appt card for patient
- g. Checks out patient on softdent
- h. Posts all procedures on softdent

9. ACCOUNTS MANAGER

- a. Check routing slip for Pre-ds
- b. Send prior authorization along with appropriate x-rays, pics & charting
- c. Log prior authorization sent in the EDSPA share folder
- d. Do the necessary billing either electronically/manually
- e. If any balance on pt's accounts - send statement out

10. STORAGE
