

A8 Returning-Patient Intake Checklist

A returning patient gets flagged at booking. The steps follow them from there.

PRACTICE _____

DATE _____

CHECKLIST From booking to the next visit

☐ Flagged as a returning patient when booked

☐ Visit type set by the dentist, not the scheduler

☐ Benefits checked before the visit (date: _____ by: _____)

☐ Likely cost told to the patient before the visit

☐ Old treatment plan flagged for the dentist to re-examine, not quoted

☐ No pressure on the old plan at the first visit

☐ Next visit booked before the patient leaves

☐ Entered on the tracking record (A9) as a kept visit

Counts and totals only: no patient names on this sheet.