Initial Visit for a New Patient

Patient Contacts Office
Call, Website Referral, Etc.

Dentist Collects Information
Personal Details & Reason for Visit

Insurance Verification
Collect Information & Verify Coverage

In-Network
Confirm All Coverage, Maximum, Deductible, Remaining Benefits

Out-of-Network
Confirm Coverage, Maximum, Deductible, Remaining Benefits ***IF PAYOR ALLOWS***

Self-Pay Patient
If Not Insured — Set Expectations for First Visit

Dentist Schedules the Right Visit
Routine or Problem-Focused Exam

Dentist Prepares BEFORE the Appointment
Insurance, Records, Forms, & Appointment Reminders

Patient Visit & Exam
X-Rays & Evaluation for Diagnosis

Dentist Explains Diagnosis & Proposes a Treatment Plan

Dentist Presents Treatment Estimates
Costs, Coverage, and *Financial Arrangements*

Dentist Obtains Informed Consent
All Patient Questions are Answered. Patient Signs the Treatment Plan with Cost Estimates and Consents to Care

Next Steps Scheduled with the Dentist, Hygienist and/or Dental Specialist