



Check-Out Checklists for Patient Coordinators

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Check-Out

Confirm Treatment

Typically, you can confirm verbally the treatment rendered with the Dental Assistant at handoff. If that is not possible, try the following:

- Review patient records.
- Review patient charting notes.
- Request treatment verification from the Dental Assistant using the internal messaging system.
- Review the **Back to Front Office Communications**.

After confirming the treatment rendered, adjust and update patient’s office visit.

Determine What Needs to Be Scanned

Review the patient records to determine if the patient has been seen by the Endodontist within the past six months.

If the patient has been seen within the past six months, verify that the scanned patient records are in the patient charting in the practice management software and scan any missing documents.

If the patient has **not** been seen within the past six months, scan the following documents in the patient charting practice management software:

- Patient Information Form**, completed and signed
- Referral Slips**
- Intake Call Sheet**
- Treatment Plan**
- Specialty Provider Referral Slips, if applicable
- Medical Clearance**, if applicable
- Insurance information, if applicable
- Treatment consent forms (for example, Apicoectomy Treatment, sedation, minimal tooth structure), if applicable
- Back to Front Office Communications**

Verify Endodontist’s Signature

Follow the steps below to verify that the Endodontist signs the Patient Health History page:

- Receive the patient records from the Dental Assistant at handoff.
- Complete the patient’s office visit.
- Combine any additional items to the patient records, if applicable.
- Verify the Endodontist has signed the Patient Health History page.
 - If the Endodontist has **not** signed the patient records, place a “sign here” sticker on the page where the signature is needed and transfer the patient records to the Endodontist for signature. When the patient records return from the Endodontist, verify that the signature is present.



Verify Endodontist's Signature

- Prepare the patient records for scanning.