New Patient vs. Established Patient

Check-in Procedure for New Patients and Established Patients

Let us view the differences in the check-in procedure for new and established patients.

The check-in procedure for a new patient includes the following actions:

1. Patient pre-registers (this can be done over the phone when the patient calls to schedule an appointment).
2. Patient completes registration forms at the first visit.
3. A copy of both sides of the patient’s insurance card is made and placed in the medical record.
4. Patient’s eligibility for services is confirmed with the patient’s insurance company.
5. Patient information is entered into a computer data management software application.
6. Patient’s medical record is produced.
7. Patient’s encounter form is created.

The check-in procedure for an established patient includes the following actions:

1. The next appointment is scheduled as dictated by the care plan.
2. Patient’s registration information is confirmed during visit.
3. Patient pays co-payment.
4. Patient’s encounter form is created.

After the physician’s staff completes a patient’s encounter form, the following actions need to be performed by the health insurance specialist for submitting the patient’s insurance claim. Note that these actions are the same for new and established patients.

1. CPT and HCPCS level II codes are matched to their appropriate service and procedure.
2. ICD codes are matched to their appropriate diagnosis.
3. Charges for provider services are entered on the form.
4. The charges are documented using either a paper or electronic system.

5. The insurance company is billed for reimbursement.

6. If there is a "no hold harmless agreement", the patient is billed for the balance not covered by insurance.

7. Payments are documented in patient accounts.

8. The claim form is completed.

9. Appropriate documentation is attached to the form.

10. The provider signs the form and documentation (electronic signature may be acceptable).

11. The signed form and documentation is filed (electronic filing is acceptable).

12. The claim is submitted (manually or electronically).