Patient Experience Steps

Welcome

1. **New Patient Requests Appointment**
2. Insurance Researched
3. Welcome Email Sent
4. Confirmation Completed
5. Greet the Patient
6. Paperwork Completed
7. Back Office Notified

Collaborate

8. Exam, Diagnosis & Treatment Plan
9. Power Pass
10. Financial Arrangement
11. Treatment Plan Scheduled
12. Treatment Started Same Day
13. Chart Documentation Completed
14. Patient Delivered to Checkout

Personalize

15. Charges Posted & Payment Collected
16. Survey Requested
17. Patient Asked for Referrals
18. **Thank You Card Sent**