Patient Intake Checklist

Basic information

- First Name
- Last Name
- Date of Birth
- Contact Number
- Address
- Reason for Calling
- Patient record exists?
- Appointment booked?

Insurance details

- Insurance provider
- Policy number
- Any additional information needed?
- Attachments / Documents

Compliance

- Upload - Consent and authorization form
- Upload - HIPAA authorization form
- Upload - Signed HIPAA authorization form

CRM

- Create new patient profile / update if the profile already exists
- Cross-check patient information
- Update profile if there are any changes in the patient information
- Collect documents
  - ID proof
  - Insurance documents
  - Medical records
  - Others

Welcome patient through email / SMS / WhatsApp

- Introduce your practice
- Send brochure
- Helpful content with regards to patient's condition
- FAQs

Schedule appointment

- Suggest available slots based on the doctor's availability
- Confirm appointment
- Send address/location or virtual consultation link
- Provide any other information related to the appointment

Medical questionnaire

- Lifestyle
- Symptoms
- Tests
- Medical history

During the appointment

- Understand patient's current situation
- Recommended tests
- Digital copy of the prescription

After the appointment

- Upload copies of ID proof
- Check whether consent and authorization forms are required?
- Send consent and authorization forms for signing
- Receive/Upload signed consent and authorization forms
- Securely store patient's medical records in EHR/EMR
- Update disposition in the medical CRM

Insurance and payments

- Check insurance coverage
- Provide payment options