

PATIENT INTAKE OPTIMIZATION CHECKLIST

Practice Information

Practice Name: _____

Date Completed: _____

Completed By: _____

Scheduling & Appointment Management

- ☐ Patients can easily schedule appointments online.
- ☐ Appointment reminders are sent automatically.
- ☐ Appointment confirmations are documented.
- ☐ Wait times are monitored and reviewed regularly.
- ☐ No-show procedures are clearly established.
- ☐ Scheduling workflows are standardized across staff members.

Notes:

New Patient Registration

- ☐ Registration forms are easy to complete.
- ☐ Forms are available electronically.
- ☐ Required demographic information is collected consistently.
- ☐ Insurance information is verified before appointments.
- ☐ Registration procedures are documented.
- ☐ Staff members follow a consistent intake process.

Notes:

Patient Communication

- ☐ Patients receive clear appointment instructions.
- ☐ Communication channels are consistent.
- ☐ Follow-up communications are documented.
- ☐ Staff provide timely responses to patient inquiries.
- ☐ Communication procedures are standardized.

Notes:

Documentation & Records

Workflow Efficiency

- ☐ Staff responsibilities are clearly defined.
- ☐ Intake bottlenecks have been identified.
- ☐ Workflow processes are documented.
- ☐ Administrative tasks are streamlined whenever possible.
- ☐ Operational inefficiencies are reviewed regularly.

Notes:

Compliance & Administrative Systems

- ☐ Policies and procedures are documented.
- ☐ Intake processes support compliance requirements.
- ☐ Staff receive periodic training.
- ☐ Administrative systems are reviewed regularly.
- ☐ Quality improvement opportunities are tracked.

Notes:

Overall Assessment

Areas Performing Well:

Areas Needing Improvement:

Recommended Action Items:

Prepared by:

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Healthcare Operations Consulting | Legal Operations Support | Administrative Systems Consulting

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