STANDARD OPERATING PROCEDURE

Dental Patient Check-In SOP

Document no.	SOP-DEN-003
Revision	1.0
Owner	Office Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To register every patient accurately, confirm insurance and payment expectations up front, and update medical history so the clinical team has current information before treatment.

2. Scope

Applies to check-in for scheduled patients arriving at the practice. New patient onboarding paperwork sent in advance and emergency walk-ins are covered by separate procedures.

Definitions

Practice management system	The software used to schedule appointments, store patient charts and manage billing and insurance.
Medical history update	Confirming or revising a patient's health conditions, medications and allergies at each visit before treatment begins.
Insurance verification	Confirming a patient's dental insurance is active and checking remaining benefits before treatment.

3. Responsibilities

Front Desk Coordinator	Greets patients, verifies insurance, collects payment and updates records in the practice management system.
Dental Assistant	Reviews the updated medical history with the patient and flags any changes to the dentist.
Office Manager	Resolves insurance or billing discrepancies and oversees front desk training.

RACI matrix

Activity	Front Desk Coordinator	Dental Assistant	Office Manager
Confirm the appointment and update contact details	R/A	-	I
Verify insurance and estimate patient cost	R/A	-	C
Update medical history and medications	I	R/A	-
Resolve billing or insurance	R	-	R/A

Activity	Front Desk Coordinator	Dental Assistant	Office Manager
discrepancies			

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Practice management system
- Insurance verification portal or phone line
- Medical history update form
- Patient consent and financial policy forms
- Card payment terminal

5. Procedure

Step	Task	Owner	Done
5.1	**Greet the patient and confirm the appointment** Greet the patient by name, confirm the scheduled procedure and provider, and note the arrival time in the practice management system.	Front Desk Coordinator	☐
5.2	**Confirm identity and contact details** Verify the patient's name and date of birth, and confirm or update their address, phone number and emergency contact in the system. **Checkpoint:** Patient identity is confirmed with two identifiers before the chart is opened for the visit.	Front Desk Coordinator	☐
5.3	**Verify dental insurance** Confirm the patient's insurance is active, check remaining annual benefits, and note any plan requirements such as pre-authorization for the scheduled treatment.	Front Desk Coordinator	☐
5.4	**Review estimated cost with the patient** Explain the estimated insurance coverage and patient portion for the scheduled treatment, and confirm the patient understands the financial policy before treatment begins.	Front Desk Coordinator	☐
5.5	**Collect payment or set up arrangements** Collect any co-payment or outstanding balance due at check-in, or confirm a payment plan already on file, following the practice's financial policy.	Front Desk Coordinator	☐
5.6	**Provide the medical history update form** Give the patient the medical history update form to review and confirm at every visit, even if they were seen recently.	Front Desk Coordinator	☐
5.7	**Collect required consent forms** Obtain any treatment consent or updated privacy acknowledgment required for the visit before the patient is seated. **Checkpoint:** Signed consent forms are on file before the patient is brought back to the operatory.	Front Desk Coordinator	☐
5.8	**Review the medical history with the patient** Go over the updated medical history form with the patient, asking specifically about new medications, allergies and any hospitalizations since the last visit.	Dental Assistant	☐

Step	Task	Owner	Done
5.9	**Flag significant changes to the dentist** Note any new medical condition, medication or allergy that could affect treatment, and bring it to the dentist's attention before the procedure starts. **Warning:** Do not proceed with treatment if a new medical condition or medication could affect the planned procedure until the dentist reviews it.	Dental Assistant	☐
5.10	**Update the chart in the practice management system** Enter the confirmed medical history, insurance details and consent status into the patient's chart before treatment begins.	Dental Assistant	☐
5.11	**Seat the patient** Escort the patient to the assigned operatory once check-in is complete and hand off the updated chart to the clinical team.	Dental Assistant	☐
5.12	**Resolve discrepancies after the visit** Follow up on any insurance denial, billing question or unresolved discrepancy identified during check-in, and update the patient's account accordingly.	Office Manager	☐

6. Quality checks

- Insurance is verified before treatment for every scheduled patient.
- Medical history is reviewed and updated at every visit, not just for new patients.
- Signed consent forms are on file before the patient is seated.
- Payment or financial arrangements are confirmed before treatment begins.

7. Records

- Medical history update forms
- Signed consent and financial policy forms
- Insurance verification results
- Billing discrepancy resolution log

8. KPIs

- Average check-in time per patient
- Percentage of visits with insurance verified before treatment
- Medical history update completion rate
- Same-day billing correction rate

9. Common mistakes

- Assuming a returning patient's medical history hasn't changed without asking.
- Seating a patient before consent forms are signed.
- Skipping insurance verification for patients seen recently.
- Not flagging a new medication to the dentist before treatment starts.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Ilia Pirozhenko

Approval

Prepared by	Approved by	Date

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