Main flow: patient seen in office

Patient calls to make appointment → Patient arrives, checks in for appointment → Nurse gets patient, puts in exam room → Clinician sees patient in exam room → Post-exam procedures (optional) → Patient check-out

Phone appointment workflow → Patient check-in workflow → Nursing pre-visit workflow → Clinical exam workflow → Exit procedures workflow

Optional: appointment reminder

Source: Robert Rowley MD
Phone appointment workflow

Patient calls, requests appointment

New Patient? 
Yes: Gather insurance info, ask patient to arrive a little early to fill out registration forms

No: Make appointment, add chief complaint

Optional: Verify eligibility
Patient arrives, checks in at front window

On the calendar?
- No: Add as drop-in appointment to calendar
- Yes: Mark as Arrived on schedule

New patient?
- Yes: Fill out new patient info:
  1. demographics
  2. insurance info
  3. Health questionnaire
  4. Consent form
- No: Verify demographic info (update if needed)

Verify insurance info

Optional: Verify insurance eligibility

Collect copay

Document co-pay received for billing

Patient In Lobby, awaiting to be called by Medical Assistant

Source: Robert Rowley MD
Nursing pre-visit

Get patient from Lobby

Collect vital signs

Verify chief complaint

Put in exam room

Document vitals, room location

Alert physician that patient is ready to be seen
Clinical exam workflow

Review chief complaint and other documentation:
1. labs
2. correspondence

Interview patient; Perform exam

Review diagnosis and recommendations with patient

Optional: refer patient to Health Ed resources

Optional: message nurse for post-exam procedures

Make post-visit plans (Exit Orders)

Exit procedures workflow

Complete note documentation

Can be at time of visit, or can be postponed until later (end of clinic session, end of day)