

New Patient Through Booking Initial Consult

PURPOSE

1. Welcome patient to our clinic. Inspire confidence in and excitement about working with us.
2. Establish basic requirements of becoming a new patient.
3. Collect relevant info for moving to next step of process.
4. Inform patient of next steps and reassure them about working with one of our trained clinicians.
5. Automated process through making first appointment, Initial Consult. Patient receives multiple communications guiding them through this process.

Make it an easy and very informative sign-up process while establishing a positive first impression.

PROCEDURE

1. Patient watches **Video on the Wufoo Application** and fills out basic application, acknowledges that they do not get final choice of clinician, and submits. (Reference **NP Onboarding Initial Inquiry for Clinician**)
2. Patient receives thank you and watches **Initial Inquiry Follow-up Video** welcoming them and also reads information below the video outlining the next steps in the process. (Reference **NP Onboarding Initial Inquiry Follow-up**)
3. Patient receives automated response (AR) email, which includes link for registering in the EHR.
4. Patient registers in the EHR, which includes signing the Patient Guide/Informed Consent for the assigned clinician. (Reference **NP Onboarding EHR Registration.**)
5. Patient receives secure message or email welcoming them to the EHR, informing them of the fee for Initial Consult and of the Cancellation Policy and providing a link with instructions to schedule their first appointment. (Reference **NP Onboarding Schedule Initial Consult**)
6. Admin staff receives notification in the EHR of the appointment request and clicks to accept it.
7. Patient receives automated confirmation of appointment.
8. Patient receives message about what to expect at the IC and watches a screen grab explaining how to prepare for the IC. (Reference **NP Onboarding Schedule Initial Consult Follow-up**)