



## **Policy for New Patient Registration and Paperwork Submission**

**Effective date:** November 1, 2025

To ensure an efficient and high-quality first appointment, all new patients must complete and submit their registration paperwork at least 48 business hours prior to their scheduled visit. This allows our clinical and administrative staff adequate time to review patient history, verify insurance benefits, and prepare for the appointment.

### **Purpose**

- To streamline the check-in process and minimize wait times for all patients.
- To allow providers to review a patient's medical history, current medications, and other pertinent information in advance, ensuring a more focused and productive initial visit.
- To ensure all necessary administrative tasks, such as insurance verification, are completed before the appointment.
- To ensure all legal and ethical consents, such as for treatment and financial responsibility, are signed and in place prior to care.

### **Scope**

This policy applies to all new patients scheduling an initial appointment with our practice and patients who have not been seen in our office for 3 years or longer.

### **Procedure**

- 1.Scheduling the first appointment:** When a new patient schedules their first appointment, they will be informed of this 48-hour paperwork policy.
- 2. Providing the paperwork:** The patient will be provided with the necessary forms, either via a secure online patient portal, email, or by mail, with clear instructions on how to complete and return them.
- 3. Paperwork submission deadline:** Paperwork must be submitted and received by our office at least 48 business hours before the appointment time. For Example: For a Monday at 2:00 p.m. appointment, the paperwork is due by the prior Wednesday at 2:00 p.m.

#### **4. Appointment confirmation:**

**1. Timely submission:** If the paperwork is submitted on time, the appointment will be confirmed. Our office will send a reminder confirming the time and date of the visit.

**2. Late or incomplete submission:** If the paperwork is not received 48 business hours in advance, the appointment will be considered unconfirmed. A staff member will attempt to contact the patient to reschedule the appointment for a later date, and the original time slot may be given to another patient.

**5. Exceptions:** This policy does not apply to emergency medical situations or if an appointment is scheduled less than 48 hours in advance for a routine exam.

-In cases of urgent or immediate need, staff will work to accommodate the patient's needs and complete paperwork as efficiently as possible. The practice may also be more flexible for certain patients who have documented circumstances, such as neurodivergence, that may make timely completion difficult.

-If the appointment was scheduled less than 48 hours in advance for a routine exam, the patient is asked to arrive at least 20 minutes prior to the appointment.

#### **Patient responsibilities**

- Complete all new patient forms in their entirety.
- Submit the forms at least 48 business hours in advance of the scheduled appointment.
- Provide a valid insurance card and photo identification at the time of the visit.

#### **Practice responsibilities**

- Clearly communicate the policy to all new patients during scheduling.
- Provide clear and easy-to-follow instructions for completing and submitting paperwork.
- Maintain the confidentiality and security of all patient information in accordance with HIPAA regulations

#### **Enforcement**

Failure to comply with this policy may result in the patient's appointment being rescheduled.