Dental new patient intake procedure

SOP TEMPLATE

Check this template against your local regulations and your own policies before you use it.

SOP no.		Version		Effective date	
Owner		Approver		Review date	

Purpose

To make sure every new patient's details, medical history and consent are complete before treatment, and kept up to date at each visit.

Scope

Every new patient, and every returning patient at each check-up.

Responsibilities

Role	Responsibility
Receptionist	Books the patient, sends and checks forms, and explains fees and privacy.
Dentist	Reviews the medical history and gets consent before treatment.

Procedure

1. **Take the booking**

   Record the patient's name, contact details, the reason for the visit and any pain or urgency.

2. **Send the forms**

   Send the registration, medical history and privacy forms to complete before the visit.

3. **Check the forms on arrival**

   Check every question is answered, and ask about anything left blank, such as medications or allergies.

4. **Explain fees and privacy**

   Explain how fees and payment work, and how the practice uses and protects their information.

5. **Review the history**

   The dentist reviews the history with the patient before any treatment, and flags allergies and conditions in the record.

   > **Caution:** Ask especially about blood thinners, heart conditions, allergies, pregnancy and bisphosphonates, which can change treatment.

6. **Get consent**

   Explain the proposed treatment, its risks and costs, and record the patient's consent.

7. **Update the history each visit**

   Ask returning patients at every visit whether their health or medications have changed.

Records

- Signed registration, medical history and privacy forms.
- The consent record for each treatment.

Related documents

- Medical emergency procedure

Revision history

Version	Date	What changed	Approved by