

# RECEPTION/NEW-PATIENT PROCESSES

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*For this section, you may want to assume the role of a “mystery shopper” and record observations as if you were a new patient at this office.*

## FIRST VISIT/RECEPTION

- When you walk into the office, how promptly are you greeted?

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- If you are a return patient, are you greeted by name?

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- If you are a new patient, how are you greeted? What instructions are you given? Are you told what paperwork to fill out?

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- If you have questions, are they answered promptly?

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- Is the front desk person friendly and smiling?

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- Does he or she provide you with information on the first visit procedures?

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- During the first visit, are all of your questions answered promptly and in a friendly manner?

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- What process is used for the first visit – x-rays taken, consultation, adjustment? How much of this first visit is done by the doctor and how much by the staff?

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- Are you adjusted on the first visit?

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- How much time did you spend waiting before you were taken back to start your visit?

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- At the end of the visit, was the payment policy stated and were you asked to pay today?

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**PHONE**

- When you call the office, how many rings before the phone is picked up?

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- If you receive an answering message, what does it say? Are you given clear instructions on how to leave a message?

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- Is your issue (want to schedule/cancel appointment, have a question, etc.) handled quickly and in a friendly, helpful manner?

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- How is the call ended?

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**VISIT PROTOCOL**

- How much time does an average visit take, including waiting time?

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- How much time did the doctor spend with you? How much of that time was spent talking and how much adjusting?

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- How much time do you spend waiting before your visit begins?

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- At the end of each visit, are you given information about your services?

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- Overall, what did you most like about the reception, new patient, and patient visit processes that you would want to emulate in your office?

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