

CREATING *Harmony* BETWEEN THE FRONT AND BACK OFFICE



DELEGATE RESPONSIBILITIES

Some responsibilities can be done by either Front or Back Office, but it is important to know which staff members in your office are expected to handle each responsibility, so no step is being missed.

INPUT PATIENT INFORMATION

The Front Office can process Patient Forms and input patient information. Use [Form Import](#) to easily import patient information when forms are filled out electronically.

VERIFY PATIENT INFORMATION

From the Back Office, verify any necessary patient information (e.g., allergies, problems, etc) that has been added to the patient's chart by the Front Office and update as needed.

TREATMENT PRIORITY & PLANNED APPOINTMENTS

When treatment planning procedures, Back Office staff can prioritize work, so it's easy to know what is grouped together and in what order. Take it a step further by creating Planned Appointments to set up appointments by attaching procedures, providers, notes and more, so that front office staff just needs to schedule them.



PRESENT TREATMENT

Once procedures are treatment planned and prioritized the Back Office, the treatment coordinator or other Front Office staff can easily present treatment to the patient with treatment already grouped and sorted.

SCHEDULE APPOINTMENT

After treatment has been presented and the patient is ready to schedule their appointment, the front office can easily schedule by using the Planned Appointment created by the back office.

