



New Patient Onboarding Checklist

Everything You Need to Collect Before the First Visit — Medical Billing Ready

Why Good Onboarding Matters for Billing: The information you collect when a new patient joins your practice is the foundation of your entire billing process. Missing or wrong information at this stage leads to claim denials, payment delays, and unhappy patients. Use this checklist for every single new patient.

Patient Name:	
Date of Birth:	
Appointment Date:	
Assigned Provider:	

SECTION 1 — Before the Appointment (Front Desk)

What To Check		Notes / Reminder
■	Appointment Scheduled & Confirmed The patient's appointment is scheduled in the system and they have received a confirmation (call, text, or email).	<i>Send 24–48 hrs in advance</i>
■	New Patient Paperwork Sent or Given Patient registration forms, medical history form, and consent forms are sent to the patient to complete ahead of time.	<i>Use patient portal if available</i>
■	Insurance Information Collected The patient has provided their insurance card details including member ID, group number, and plan name.	<i>Ask for front and back of card</i>
■	Insurance Eligibility Pre-Verified You have checked with the insurance company that the patient's coverage is active and what their benefits are.	<i>Check via eligibility portal</i>
■	Copay / Deductible Information Noted You know how much the patient's copay is and how much of their deductible has been met for the year.	<i>Tell patient before visit</i>
■	Prior Authorization Checked You have checked whether the planned service or referral requires insurance pre-approval.	<i>Obtain auth if required</i>

SECTION 2 — At Registration (Day of Appointment)

What To Check		Notes / Reminder
■	Government-Issued Photo ID Copied You have made a copy of the patient's driver's license, passport, or other government photo ID.	<i>Keep copy in patient file</i>
■	Insurance Card(s) Copied (Front & Back) You have copied both sides of every insurance card the patient has — primary and secondary if applicable.	<i>Update if card has changed</i>

■	Patient Registration Form Completed The registration form with name, address, date of birth, phone, and emergency contact is fully filled out.	<i>No blank required fields</i>
■	Medical History Form Completed The patient has completed their medical history including current medications, allergies, and past health issues.	<i>Provider reviews before visit</i>
■	HIPAA Privacy Notice Signed The patient has received and signed the Notice of Privacy Practices form acknowledging their HIPAA rights.	<i>Keep signed copy in file</i>
■	Financial Responsibility / Payment Policy Signed The patient has signed a form explaining that they are responsible for any balances insurance does not pay.	<i>Required for collections later</i>
■	Assignment of Benefits Signed The patient has signed a form allowing insurance payments to go directly to the practice instead of the patient.	<i>Required for direct billing</i>
■	Release of Information Signed The patient has signed allowing your office to send their records to other providers and insurance companies.	<i>Keep in permanent file</i>

SECTION 3 — Clinical & Administrative Setup

What To Check		Notes / Reminder
■	Patient Entered in Electronic Health Record (EHR) All patient information is entered into your EHR or practice management system accurately.	<i>Double-check spelling</i>
■	Referring Provider Info Added (if applicable) If the patient was referred by another doctor, that doctor's name and contact info are in the patient file.	<i>Needed for some claims</i>
■	Pharmacy Information Collected The patient's preferred pharmacy name, address, and phone number are recorded for prescriptions.	<i>Optional but helpful</i>
■	Primary Care Provider Noted The patient's regular family doctor or primary care provider is noted in the file.	<i>Required by some plans</i>
■	Patient Portal Account Created If your office uses a patient portal, the patient has been enrolled and knows how to log in.	<i>Improves communication</i>

SECTION 4 — After the Visit (Billing Follow-Up)

What To Check		Notes / Reminder
■	Charges Entered on Same Day as Visit All services provided during the visit are entered into the billing system before the day ends.	<i>Reduces missed charges</i>

■	Diagnosis and Procedure Codes Assigned The correct ICD-10 and CPT codes are assigned based on the provider's documentation.	<i>Must match chart notes</i>
■	Copay / Payment Collected and Posted Any copay or payment collected at the visit is entered into the billing system and a receipt given to the patient.	<i>Reconcile daily</i>
■	Claim Submitted to Insurance The claim for this first visit is submitted to insurance within 24–48 hours of the visit.	<i>Earlier = faster payment</i>
■	Welcome Letter or Follow-Up Sent A welcome message or follow-up communication is sent to the new patient.	<i>Improves patient retention</i>

Remember: A complete patient file from day one prevents billing problems for the entire time that patient is in your practice. Taking 10 extra minutes at onboarding saves hours of billing corrections later.

Complete for every new patient • Store all signed forms in patient file • HIPAA Protected Information