Month: _____ Year:____   Team member responsible for completing log: _____

New Patient Log and Checklist			Report of Findings (Check for "yes.")	Tx Program (Check for "yes.")	Fin. Conslt (When & by whom)	Mult. Apt.Card (Check for "yes.")	First Adjst Call (Check for "yes.")	Source	If referred by patient, or MD what is name?	Type	Sent report to patient's MD. (Check for "yes.")	Who is MD
	Date	**Patient Name**										
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												
17												
18												
19												
20												

Last revised: *1/10/2024*

KEY:

SOURCES OF NP'S

Internal
Patient Referral = **PR/who**
Doctor Referral = **DR**
Staff Referral = **SR**
Reactivated = **ROP**
Re-injured = **RI**

External
Website = **WS**
Sign/Location = **SL**
Business Referral (who) = **BR**
Attorney Ref. (who) = **ATR**
HealthCare Ref. (who) = **HCR**
P.I. Letter = **PIL**

Screening = **SC**
Advert. = **Ad**
Insurance Plan **=IP**
Special Promotion (what) = **SPEC**. (____)
Lecture, Workshop (what) = **LCT**
OTHER (what) = **O** (___)

TYPES OF NPS

Comm.Insurance = **IN**
Workers Comp = **WC**
Personal Injury = **PI**
Medicare = **MC**
Medicaid = **MCD**
HMO = **HMO**
PPO = **PPO**
Cash = **C**
Wellness Care = **WLC**

NOTE: This can be also be used as a checklist in your staff meetings or morning "huddles." Also: 1) Always try to put down the name of the patient, business, attorney, special event, etc. that generated the new patient. For example, "PR(H.Lilard)" for a patient referral that Harvey Lilard sent in, "HCR (Casey, MD) " indicates the health care referral was from Dr. Casey, or "BR (IBM)", indicating the business referral was from IBM. 2) " Special Promotions" includes one time events, such as a "Kid's Day",   "Patient Appreciation Week", etc. Please Write in what the Special Promotion was that generated the new patient. 3.) Occasionally, a new patient may legitimately come from two sources, such as phone book and referral, write down the dominate source, or if equal, simply put a slash through both sources. For example, "PR(Palmers)/SC (CntyFair)" for a patient referral that also came in off of a screening. 4) Write in all first visits "Patient Name". Once they become a NP, then you can give them a patient number.