

A quick patient intake audit checklist for growing practices

A ringing phone in your practice is a patient deciding whether to trust you with their care, and a slow answer sends that trust to the practice down the street. In [CallRail's healthcare trends research](#), 58% of practices said front-desk staff still manage every new inquiry, and 49% send form fills straight to a general inbox.

This patient intake audit checklist helps you see where your process is working, and where it's letting patients slip through.

01

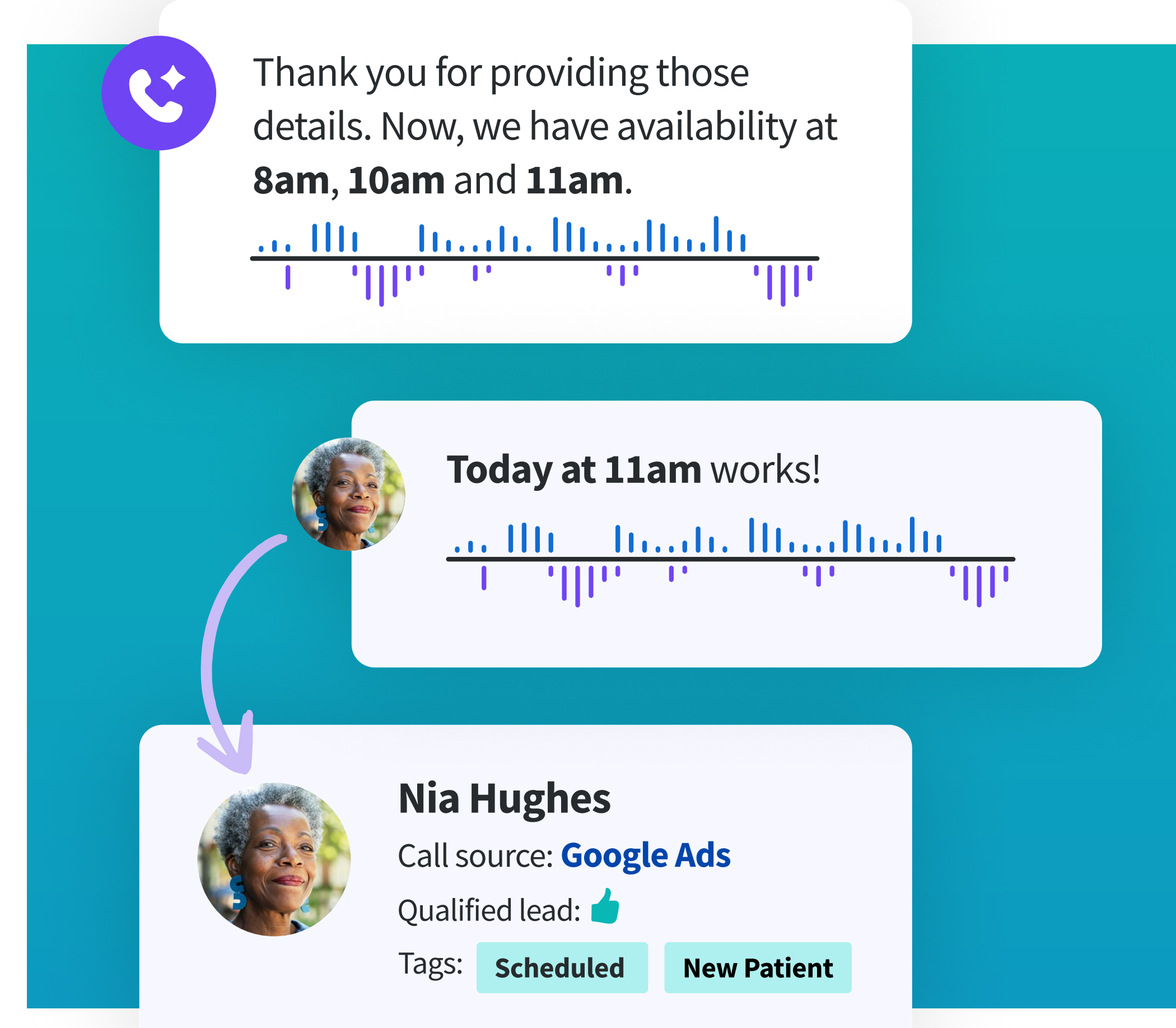
Response time and availability

How you handle that first contact, whether it lands at 9 a.m. or 9 p.m., sets the tone for the entire relationship.

- Do you answer or acknowledge every patient call or form quickly, even during your busiest times?** A slow response tells a patient you're not ready for them, and many will call the next practice on their list before you get back to them.
- Do you have a reliable way to handle after-hours calls and overflow when the front desk is swamped?** Patients don't stop calling at 5 p.m., and a call you miss after hours is still a patient you lose.

Respond, no matter who's on shift

[AI voice assistants](#) can cover overflow and after-hours calls. They can also capture the same patient information every time, so neither depends on who's at the desk (or not) when the phone rings.

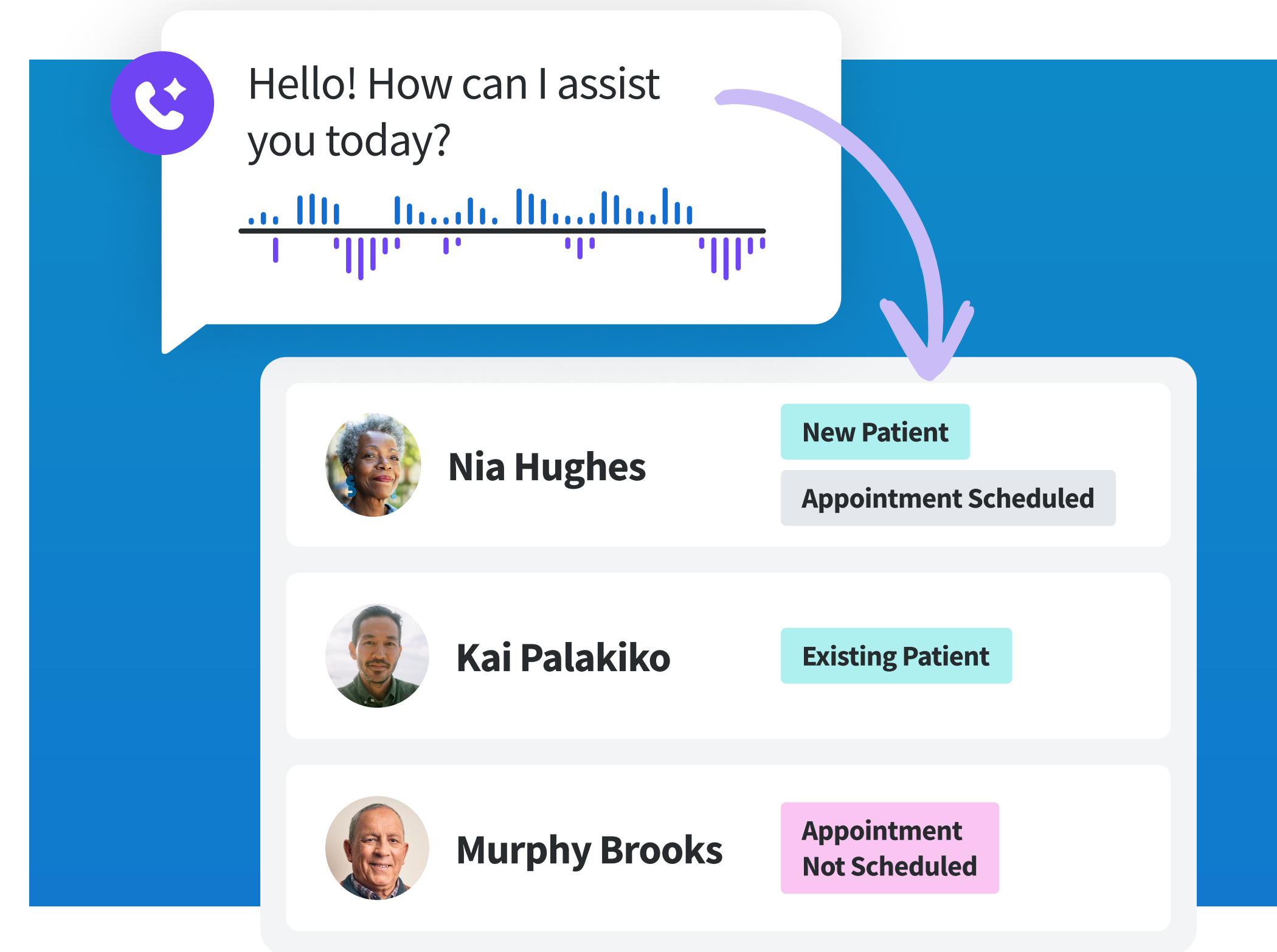


02

Data capture and compliance

What you capture on that first call or form sets up everything that follows.

- Are you capturing the same patient details every time, on every call and every form?** Missing details means your team spends extra time chasing information that should already be on file.
- Are you handling patient information in a way that supports HIPAA compliance?** Sensitive details sitting in a general inbox or on a sticky note create risk your practice can't afford.

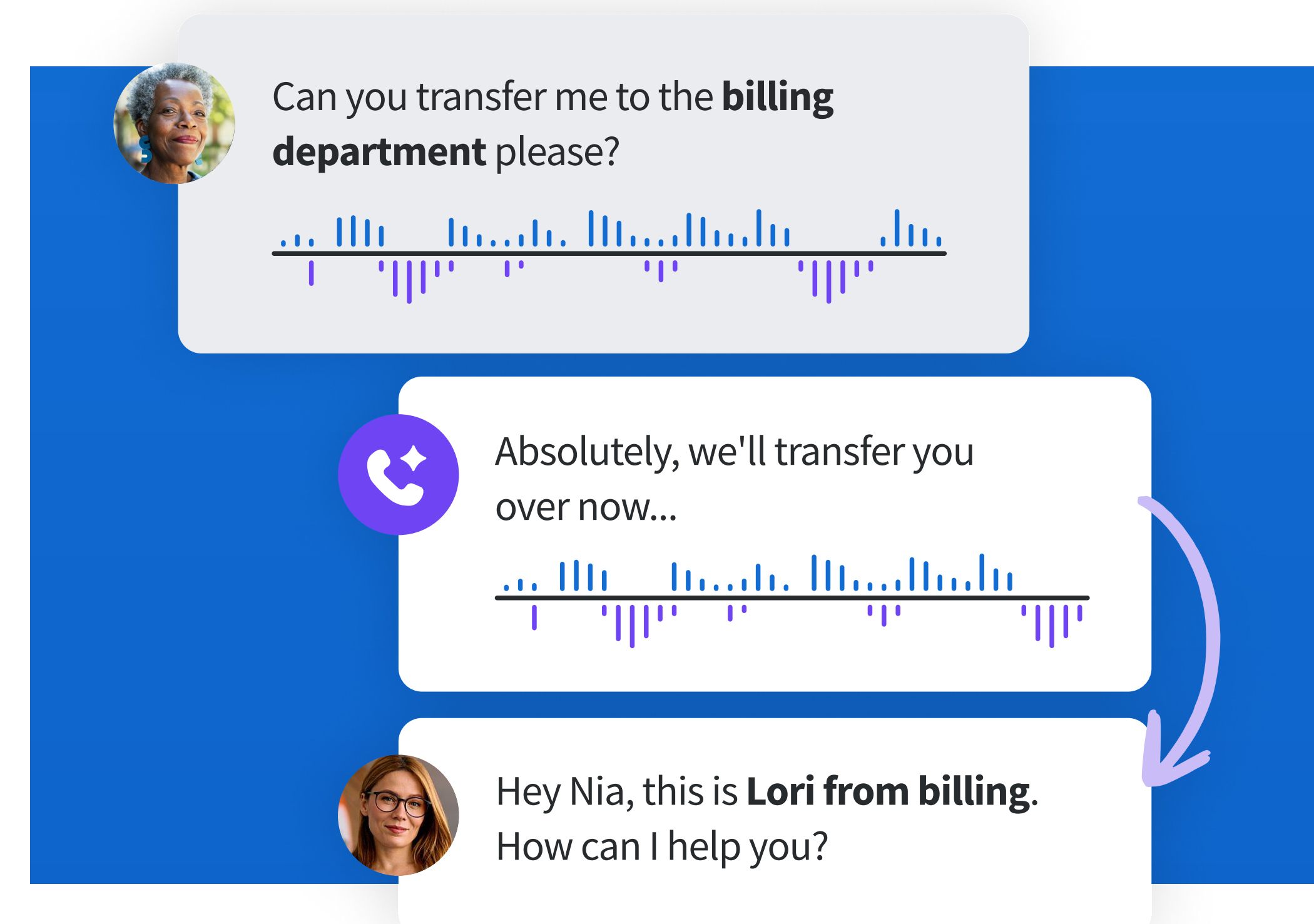


03

Routing and systems

Once a call or form comes in, where the information goes next matters as much as how fast you answered.

- Do inquiries land in the system your team actually works from, instead of a shared inbox nobody consistently checks?** A clear handoff keeps inquiries from slipping through the cracks.
- Do call summaries and notes flow automatically into your practice management system or EHR, or does someone have to type them in by hand?** Manual entry is where details get dropped, and where your team's time goes, instead of toward patients.



Connect intake to the tools you already use

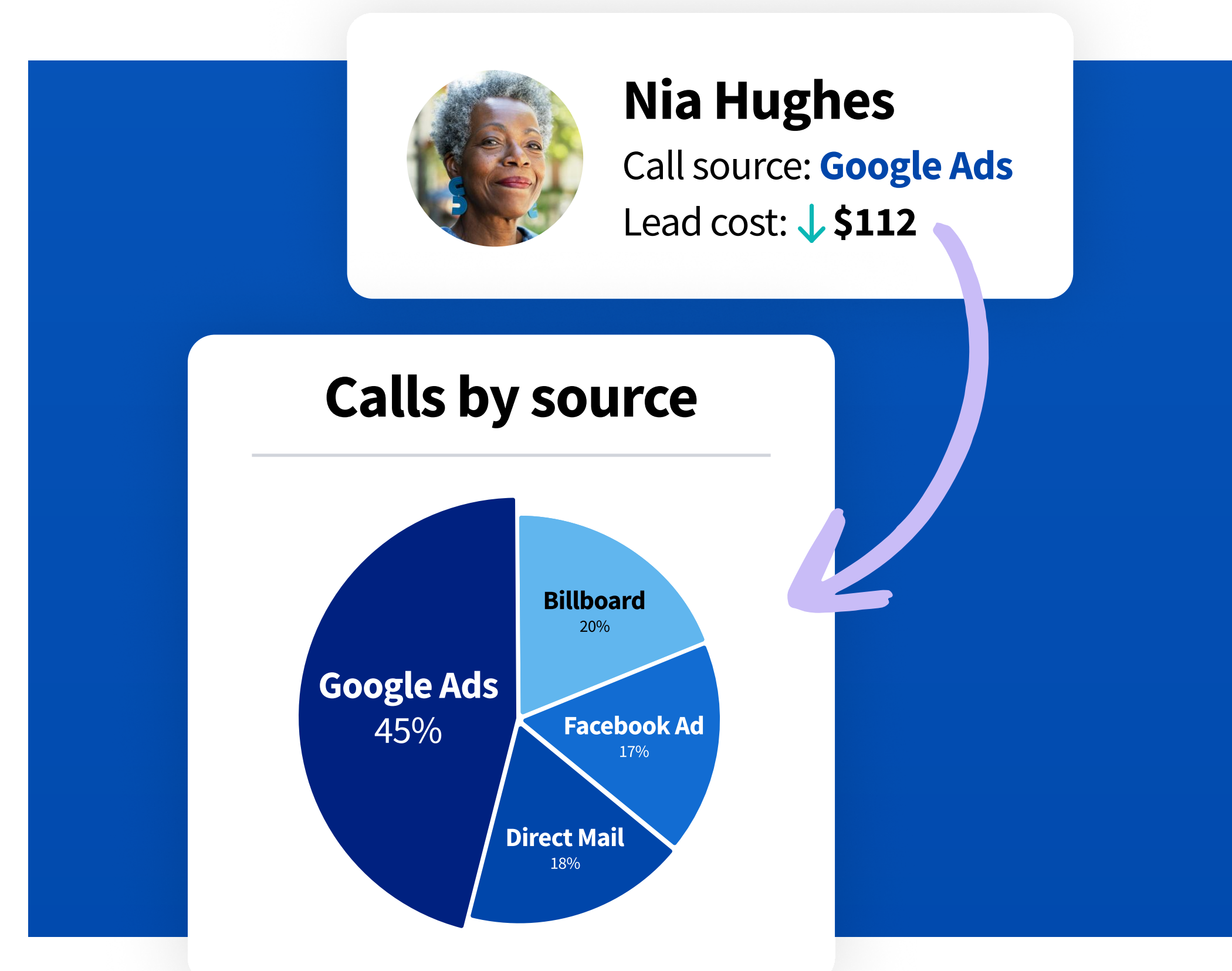
Patient details, call summaries, and marketing source data should land in the software your team already uses — your CRM, PMS, or EHR — whether through a direct connection or a secure integration tool like [Keragon](#), not sitting in a separate system nobody checks.

04

Marketing visibility and follow-up

Getting the call is only half the job. What you do next decides whether it turns into a scheduled patient.

- Do you know which marketing channels are driving the calls and forms that turn into new patients?** Without that visibility, it's hard to know where your marketing budget is paying off.
- Is there a standard follow-up step for every inquiry, so new patient leads don't go cold while you wait for a chance to call back?** Consistent follow up turns more inquiries into booked appointments.



Every unchecked box is a patient you already paid for

Count how many boxes you checked. If you're missing more than a couple, your intake process is losing more patients than your marketing budget can afford to lose.

[Try CallRail free for 14 days](#) and see how your practice could turn more calls into booked appointments.