

Date: _____

New Patient Scheduling Guide

Scheduled by: _____

“Good morning, (Your Practice), This is _____, how may I help you?”

“I’d be happy to help you with that! May I have your name?”

Name: _____

“What is the best phone number to reach you in case we get disconnected?”

Phone: _____

“Have you been here as a patient before?”

Yes _____ **No** _____

“How did you hear about us?”

Referral Source: _____

“Let me be the first to welcome you to (Your Practice)!”

“What prompted you to call in today?”

Reason for Appointment: _____

Symptoms: Discomfort Pain where? _____ How long has it been? _____

Broken Tooth Lost Filling/Crown Bleeding gums Accident Wisdom Tooth

Last time at the dentist? _____ **Last Cleaning?** _____

Concerns: _____

“You made the right decision by calling us today! Let me see when the next available time (Your Dr/Hygienist) has an opening to see you. What is better for you, mornings or afternoons?”

The next available appointment is: _____

“Let me get some additional information from you to finish booking your appointment, this way it helps speed up the registration process. Now, will you be using any Dental Insurance for your appointment?”

No Insurance:

DOB: _____ Best Contact # Cell: _____ Home: _____ Work: _____

E-Mail: _____ Address/Zip: _____

Insurance:

Do you have dental insurance? Yes _____ No _____ Name of Insurance Carrier: _____

Member ID: _____ Group Number: _____

(If not the patient)

Name of Primary Insurance Holder: _____

Primary Ins. Holder DOB: _____ Primary Ins. Holder SS#: _____

Employer: _____

Health Information:

“Do you have any medical history we should be aware of for example... Asthma, High Blood Pressure, Back Problems or Allergies.”

Medical History: _____

Closing & Confirming:

- Give patient brief overview of new patient appointment and consult process.

“Is there anyone that you would like to bring with you to your appointment that would like to hear what the doctor has to say?” Other visitor: _____

While I have you on the phone, is there anyone else that you would like to schedule in your family?

“Thank you once again! You made the right decision by calling us today. We look forward to meeting you!

If for any reason you can't make it then, would you promise to call me back so that I can give your spot to someone else who is waiting? (Pause and Wait for answer)

“How do you prefer your appointment reminders voice, email or text?”

“Ok Great, so I'll be sending an e-mail and attached will be our patient forms for you to fill out prior to your appointment but if your unable to fill it our please come 15 minutes prior to your appointment.”

“Do you know where the office is located?” Give directions as necessary.

“Did I answer all your questions? Is there anything else that I can help you with? Thank you for calling!”

RATING: A B C- Mark in Patient Notes for Appointment

JP 11/06/2016