

New Pt Call Flow Sheet

1. THANK THEM FOR CALLING

Ask the Patient's name (Who am I speaking with?)

How did you hear about us? (Referral Source)

Are you having any specific problems or concerns?

2. MAKE THE APPOINTMENT

Do mornings or afternoons work better for you?

___ Mornings ___ Afternoons

First available appt time is: Will that work for you?

___ Yes ___ No

Appt Date: _____ at ___:___ am/pm

Tell them what to expect at the first appt: (Complete exam, necessary x-rays, & basic cleaning if no perio disease)

Say something great about the Dr/Hygienist. This builds confidence.

3. BE OF SERVICE

What is the best # to reach you at during the day?

Is there an alternate phone # where we can reach you?

Work: _____

Cell: _____

Address: _____

Is there any dental insurance we can check on ahead of time for you?

4. BUILD THE RELATIONSHIP...C.A.R.E.

People don't care how much you know until they know how much you care!

5. BE OF SERVICE

- * Tell the patient your name again
- * Repeat the appt date & time
- * Ask them if they need directions.

6. HOUSEHOLD

Are there any other family members we can schedule for you at this time?

Explain how to access pt forms from our website:

MaricopaDental.com, Bottom of Home Page

Subscriber:

Employer:

Insurance Co:

Insurance Co Phone #:

ID# or Soc Sec #:

Subscriber Bday:

Patient Bday:

TEAM MEMBER:

Date of Call: