



NEW PATIENT PHONE SLIP

"Thank you for calling! You have definitely called the right place, (personalize message)..."

CALLER'S NAME:

Have you ever met any of our doctors before? Yes/No:

If yes, Who? When?

Have we seen any Immediate Family Members in our office before?

If no, explain that we have an amazing team of Doctors who all work together to create beautiful smiles!

PATIENT NAME:

BIRTH DATE

BEST PHONE #:

E-Mail Address:

+ - "In the event treatment is indicated, we would like to do a complimentary insurance benefits check prior to this appointment so we are able to help you plan financially?" Dental Insurance: Yes No
If yes turn page over

+ - "Who **may we thank** for referring you to our office?"

Doctor:

Patient:

Other:

+ - "Who is your **general** dentist" _____

+ - "Date of last cleaning?" _____

+ - "Is there any **remaining** dental work left to complete?" Yes No

+ - "What is the **main** concern?" _____

+ - "When you think of braces, are you thinking about something clear or removable?"

"We'd love to make this visit more convenient for you, while I'm in the schedule, is there anyone else in the family you would like us to examine now or in the future? We generally recommend that children have their first visit around age 7."

YES / NO

NAME:

BIRTH DATE:

Male / Female

APPOINTMENT DATE:

APPOINTMENT TIME:

+ - **Trial Close:** "Mrs./Mr. _____, please allow an hour for the appointment. The Doctor and our Treatment Coordinator will do an extensive exam, including diagnostic photos and x-rays and if The Doctor feels that is ready, we will go ahead and get him/her started with a digital scan or possibly the braces" Response:

"We will send you a text message with a link included for you to complete some paperwork prior to your appointment. Please complete this paperwork as soon as possible in order for us to see you / (your child)."

Choices & Expectations: "_____, we look forward to meeting you and _____ on _____. I know you are going to love the doctors here" (Personalize your message) "If you have any questions between now and the appointment, please do not hesitate to call. Everyone here is wonderful and you can even ask for me, my name is _____. Thank you again for calling, have a great day, _____."

Today's Date:

Scheduling Coordinator:

Patient #:

Readiness to Start: 1 2 3 4 5 6 7 8 9 10

(Level of excitement regardless of age and dentition from your perspective)