

UNIDENTIFIED (NEW) PATIENT CALL SHEET

Hello! Thank you for calling the office of Dr. Callen, _____ speaking. How may I help you?

1. Patient concern: _____

2. May I have your name please? _____

3. When was your last appointment with the doctor? _____

4. Are you having any discomfort? _____

5. Well, (Patient Name) we would love to welcome you to our practice as a new patient! Would you prefer Mornings or Afternoons for your appointment? AM PM

MAKE APPOINTMENT! Get address and phone number and enter into computer along with insurance/work info.

6. Do you have a preference on which doctor you see? _____

7. How did you find out about our office?

Patient Referral: Referred by: _____

Phone Book

Saw Sign

Direct Mail

Google

Facebook

Town Money Saver

Other: _____

8. If reluctant to schedule, offer :

Free Cosmetic Consult

Free Denture Consult

Free Second Opinion

Free Implant Consult

Free Look/See Appointment

9. If don't schedule, get address and phone number. Tell them you will send them information about the office

Patient Address: _____

Patient Phone Number: _____

10. Review financial information of appointment, date and time. Thank them for calling. "We will be looking forward to meeting you!" Show enthusiasm!

11. While I have you on the phone, is there anyone else I need to schedule for an appointment?

12. Send New Patient information packet.

NOTES: _____
