

## **New Patient Checklist**

May I ask how you heard of our office?

We are currently scheduling appointments into \_\_\_\_\_. I do have a Cancellations list should you wish to be on it?

Would you prefer a morning or afternoon appointment?

Appointment Date and Time : \_\_\_\_\_

Patient Name: \_\_\_\_\_

DOB: \_\_\_\_\_

Phone# : Home: \_\_\_\_\_ Cell: \_\_\_\_\_ Work: \_\_\_\_\_

Responsible Party: \_\_\_\_\_

Address: \_\_\_\_\_

Email: \_\_\_\_\_

Dentist: \_\_\_\_\_

The Exam Fee is: \$ \_\_\_\_\_

Do you have insurance with Ortho Coverage? \_\_\_\_\_

Group/Contract/ Policy#: \_\_\_\_\_ Policy Holder: \_\_\_\_\_

ID/ Certificate #: \_\_\_\_\_ DOB: \_\_\_\_\_

### **SUMMARY**

Scheduled for: \_\_\_\_\_

On the Cancellations List? **N** **Y**

We ask for confirmation of attendance 2 days prior to the exam.

We will be sending you New Patient Forms

### **\* Did you have any Questions for me?\***

Additional Information- if the caller offers more information, Take it!

Last visit to DDS:

Did you have an x-ray taken recently?

### **After the Call**

- 1) Create the patient's file
- 2) Book the appointment
- 3) Place on the cancellations list if asked
- 4) Notate the conversation in the notepad
- 5) Give the checklist to the NPC

### **NPC To Do**

- 1) Scan the checklist to the patient's file
- 2) E-mail or mail the Responsible Party NPE forms
- 3) Enter the appointment into the Exam Stats Spread Sheet
- 4) Call the DDS for insurance information and PAN