

# NEW PATIENT PHONE PROCEDURE

**"Chiropractic Health Center, this is [Your Name]. How may I help you?"** *(Listen to the Patient.)*

**"When was the last time you saw the doctor?"** *(If you are not aware of who the patient is...)*

**"May I please have your name?"** *Be sure to ask for correct spelling.*

Name: \_\_\_\_\_ Legal First Name: \_\_\_\_\_

**"May I have your phone numbers?"** (H) \_\_\_\_\_, (W) \_\_\_\_\_, (C) \_\_\_\_\_

**"Your address?"** Address: \_\_\_\_\_

**"May I ask who referred you to our office?"** Referred by: \_\_\_\_\_

*Comment on the referral in a positive way. Example: "Mary has been a great friend of our practice!"*

**"What is your main area of concern?"** Primary Problem area: \_\_\_\_\_

**"I see. We've helped lots of people with similar complaints."**

**"We have special times set aside for new patients. Would today or tomorrow be best for you?"**

**"Would you prefer morning or afternoon?"** *(Be sure to use two choices system.)* **Great, I can schedule that for you!"**

*Tell patient an appointment time that is 20 minutes before the actual appointment book time, which is Doctor time.*

*(DON'T SAY: "Come in 20 min early to fill out paperwork.")*

**APPOINTMENT:** *(Day/Date)* \_\_\_\_\_ at *(Time)* \_\_\_\_\_ Dr.: \_\_\_\_\_

**"As a courtesy, if it applies, we can verify and file insurance on your behalf. Will we be filing insurance for you?"**

If yes: **"OK, I'll need some insurance information."** *(See appropriate box below.)*

**"Is this related to a specific injury, like an Auto Accident or a Worker's Comp Injury?"**

Insured: \_\_\_\_\_ Insured's DOB: \_\_\_\_\_

Patient's DOB: \_\_\_\_\_ Insured's SS#: \_\_\_\_\_ Patient's SS#: \_\_\_\_\_

Insurance Co.: \_\_\_\_\_ Group #: \_\_\_\_\_ Policy #: \_\_\_\_\_

ID#: \_\_\_\_\_ Claim #: \_\_\_\_\_ Phone #: \_\_\_\_\_

**Cash, Gen. Insurance, Medicare**

*"[New Patient's Name], there will be No Charge for your initial consultation with the Doctor. If you proceed with an examination and/or x-rays, we ask you to come prepared to pay \$XX as a down payment towards the cost of those until we can verify your insurance coverage for you unless you have a known co-pay then that amount will be due on this visit."*

**Auto Accident, Personal Injury**

*"Please bring the following with you:*

- your own insurance claim number,*
- insurance company information,*
- your car insurance card, and*
- the police report, if you have it.*

*Are you working with an attorney? If so, please bring your attorney's name and phone number."*

**Workers' Compensation**

*"For a work-related injury there will be no charge for your consultation when you bring the following items with you:*

- the name of the person who has authorized your treatment,*
- their phone number,*
- the claim number, and*
- the insurance company informat'n*

**"[New Patient's Name], to save you time I will email or fax our new patient paperwork to you to complete before you come to the office. What is your email address or fax number? Great, I will get that right out to you. You can also download the forms from our website at [www.website.com](http://www.website.com) and click on 'New Patient Forms.'"**

**"Also, as a courtesy like I said, we will call to verify any insurance coverage you may have, but you should know that we make our care affordable for even those without any insurance coverage at all."**

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

**"Do you know where our office is located?"** *Give directions to the office and tell them there is a map on the website.*

**"Your first visit will take about an hour to an hour and a half, so please plan accordingly."**

**"Thank you for calling our office and [New Patient's Name] we look forward to seeing you on [DAY] at [TIME]."**

CA Name: \_\_\_\_\_ Date: \_\_\_\_\_