

Guidelines for Effective Patient Conversations

New Patient Script

Scheduling Coordinator: Good afternoon, thank you for calling Smith Family Dental. This is Julie speaking. How may I help you?

Patient: Oh, hi Julie, my name is Shelley and I'm calling to see if I can get an appointment.

Scheduling Coordinator: Well, that's great! Thank you so much for calling Shelley. I'd be happy to schedule an appointment for you. When was your last visit to our practice?

Patient: Oh, I'm a new patient. I haven't been to your practice before.

Scheduling Coordinator: Well, welcome! You've made an excellent choice. I'm one of our New Patient Coordinators, so I'll be able to help you with everything you need. Let me start first by confirming your callback number in case we get disconnected for any reason.

Patient: Ok, sure. The number is 555-444-1212.

Scheduling Coordinator: Thank you, Shelley. Let me just ensure I have the correct number. I have 555-444-1212. Is that a cell phone number?

Patient: Yes, that's my cell. That's the best number to use to reach me.

Scheduling Coordinator: Now, Shelley, may I ask who we can thank for referring you to us?

Patient: Yes, Lucy Jones. She spoke very highly of you all. Our kids go to the same school.

Scheduling Coordinator: Oh, that's wonderful! We love seeing Lucy and her family. I'm so glad she told you about us, and I'll certainly be sure to thank her the next time we see her.

Dr. Smith and our team are truly excellent at what they do. Not only do they provide awesome dental care, but they make our patients feel comfortable and enjoy their experience at every visit.

Let's go ahead and get you scheduled for an appointment. Dr. Smith reserves time in his schedule specifically for new patients, and your initial visit will consist of a comprehensive new patient examination in which Dr. Smith will get to know you and your particular oral health needs and goals. Our new patients really appreciate the time Dr. Smith takes to focus on them individually. We reserve an hour for these appointments and have time available on Thursday at 1:20 PM or next Tuesday at 10:00 AM. Which of these is more convenient for you?

Patient: I'll take Tuesday at 10:00 AM.

Scheduling Coordinator: Wonderful. I've got that time reserved for you. Now, Shelley, do you have any particular areas of concern right now that you'll want Dr. Smith to address?

Patient: No, nothing in particular. I just haven't been to see a dentist in a few years since I left the office I used to go to.

Scheduling Coordinator: Well, you've made an excellent decision to get reconnected with a dental practice, and we appreciate that you chose us. At Smith Family Dental, we consider your health and safety a #1 priority in our practice. We have always followed the strictest infection control guidelines of the American Dental Association and the Centers for Disease Control and will continue to do so as regulations change in order to keep you safe. Is that about when your last dental hygiene appointment was?

Patient: Yes, about 2 or 2 ½ years ago.

Scheduling Coordinator: Well, we're going to take wonderful care of you. Now do you have any additional family members we can get scheduled today as well?

Patient: Oh, that would be great. My husband and three kids will need appointments too.

Scheduling Coordinator: Wonderful. We love it when we get to meet the entire family. How old are your children?

Patient: They are 6, 8, and 10.

Scheduling Coordinator: Well, Dr. Smith and our team are great with kids, and we do all kinds of fun things in the office just for them. In fact, if you check out our Facebook page, you'll see some photos of our most recent activities.

Now, for your children's first visit, they'll be seen by one of our registered dental hygienists and Dr. Smith will conduct a full examination as well. We have found that our families have the best experience when we schedule no more than three appointments on the same day. This helps prevent too much wait time for each child and ensures you're able to be present during each child's treatment. We do have two appointments available on Tuesday when you come in. Shall

I go ahead and reserve time for two of your children on that date or would you prefer to schedule the three of them together?

Patient: You know what, let's do my appointment first and then we can do the kids on a different day. I think what I'll do is plan to schedule those when I come in next week. I just realized I need to look at the kids' sports schedules to coordinate around that, so I'll bring them with me when I come in.

Scheduling Coordinator: Perfect. Now, let me get some additional information to ensure that we're fully prepared for your visit. Let me start by getting your last name followed by your address.

Patient: It's Johnson, and my address is 223 Spruce Street. Actually, I think we live one street over from your office.

Scheduling Coordinator: Yes you do! How convenient! We are right on the corner of Pine and Elm, so you should have no trouble finding us.

Now, may I have an email address that we may use to communicate with you about your family's appointments?

Patient: Sure. It's johnsoncrew@email.com.

Scheduling Coordinator: Excellent. One of the great services we provide is the ability to receive appointment communications via email and text message. Our patients really appreciate this. With your permission, I'll go ahead and enable you to begin receiving our messages. Typically, you can expect to receive an email message two weeks prior to your appointment and a text message 48 hours in advance.

Patient: That's great. I love being able to get everything on my phone these days.

Scheduling Coordinator: Yes, isn't it convenient? Now, Shelley, do you have dental insurance that you'll be using for your family's care here?

Patient: We do, but I don't have my card on me at the moment. We're with Delta Dental though. It's through my husband's employer. He works at the hospital.

Scheduling Coordinator: That's no problem. I can follow up with you later today or tomorrow to get that information. We are considered in-network with Delta and our Financial Coordinator, Janelle, will work with you to ensure that you get the maximum reimbursements to which your plan entitles you.

So, Shelley, let me tell you what will happen next. By the end of the day today, you'll receive an email from Dr. Smith. In it you'll find a link to our website where you can access all kinds of valuable information about our practice. You can also complete and submit your new patient forms right through our website, which will ensure that we have all the additional information we need to be prepared for your visit next week.

Patient: Fantastic.

Scheduling Coordinator: So, are there any additional questions I can answer for you, Shelley?

Patient: Well, I'm sure I'll see it on your website, but does Dr. Smith do whitening? I've been thinking about it for myself.

Scheduling Coordinator: He sure does. In fact, we have a few different whitening systems available, and as part of your examination, Dr. Smith will evaluate whether you're a good candidate for whitening and talk with you about what options may work best.

Patient: Great, thanks so much.

Scheduling Coordinator: My pleasure! Thank you again for calling, Shelley. Dr. Smith and our entire team will be looking forward to seeing you on Tuesday at 10:00 AM. Have a great weekend.