

New Patient Intake Form

Provide "Above & Beyond" Customer Service - setting you apart from your competition!
Empathize with the patient.

IDENTIFY YOURSELF- When you answer the phone

GET CALLER'S NAME AND PHONE #- Within the first 20 seconds in case you get disconnected

Pt Name	Phone #
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ASK IF NEW PATIENT OR CURRENT- If NEW, ask for referral source

How did you hear about us?

IDENTIFY REASON FOR VISIT- Emergency, Regular, Procedure, Consultation. If applicable, always offer available promotions.

What is the reason for your call?

COLLECT INSURANCE INFORMATION

Home Address	City,State,Zip	Home Phone
SSN	DOB	Email
Sex (Circle One): Male Female	Marital Status (Circle One): Single Married Divorce Other	Contact Preference (Circle One): Phone Text Email

Primary Insurance:

Primary Insurance Company	Phone No.	ID No.
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Secondary Insurance:

Secondary Insurance Company	Phone No.	ID No.
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Insurance Subscriber Information (if different from patient):

Name	Home Address	Home Phone
Home Address	City,State,Zip	Email
SSN	DOB	Contact Preference (Circle One):
Sex (Circle One):	Marital Status (Circle One):	Occupation

Responsible Party (if different from above):

Name:	DOB:
SSN:	Driver's License No.

KNOW/OFFER YOUR NEXT AVAILABLE APPOINTMENT- When you answer the phone

ALWAYS ASK BEFORE PUTTING A PATIENT ON HOLD- And offer a call back so they don't have to wait

REMEMBER THE GOAL OF EACH CALL IS TO SCHEDULE AN APPOINTMENT- Avoid the patient committing to a call back - address any hesitation to set an appointment and gently guide them back to coming in for an appointment as the best choice.

CONFIRM THE APPOINTMENT- Before hanging up & ask if they need a reminder. Repeat the day, date, and time.

THANK THE PATIENT FOR CALLING- And remind them you are there if they have any questions or need to make any changes