

**NEW PATIENT RESEARCH FORM**

Date \_\_\_\_\_ Team Member \_\_\_\_\_  
\_\_\_\_\_ Adult \_\_\_\_\_ Child \_\_\_\_\_ Age \_\_\_\_\_

**INCOMING CALL: Smile & Ask???'s:**

- Thank you for calling (name of practice) \_\_\_\_\_. This is (your name), how may I help you?
- Thanks again for calling. My name is (state your name again) and yours is? \_\_\_\_\_
- How long has it been since we last saw you in our office?. \_\_\_\_\_
- How did you hear about our office?. \_\_\_\_\_

**P D Q (Probe, Discover, Question)**

- How long has it been since you last saw a dentist/hygienist? \_\_\_\_\_
- Whom did you see? \_\_\_\_\_ Do you have current x-rays? Y/N (date) \_\_\_\_\_
- Any Medical Alerts? \_\_\_\_\_ Ever had to premedicate for Dental Appts? \_\_\_\_\_

**SWOT: We like to get to know our patients like family. May I ask you a couple of quick questions about your past dental experiences?**

- S. What did you like about your visits? \_\_\_\_\_
- W. Was there anything you did not like? \_\_\_\_\_
- O. What can we do to help make your visits more comfortable? \_\_\_\_\_
- T. Is there anything else we should know? (time, cost, etc) \_\_\_\_\_

Patient's Name _____	DOB _____
Address _____	City _____ State _____ Zip _____
Home Phone # _____	Work Phone # _____ Cell Phone # _____
Occupation: _____	Hobbies: _____

**Close: (Complete appt for an exam)** "In order to give you the same great experience as (ref. source), we'd like to get you started the same way we did with him/her and how we get started with all of our patients. I will go ahead today and schedule you for an appt w. Dr. DeLapa for exam & x-rays. Does that make sense to you? (Keep the referral source on your shoulder. Explain when cleaning will be.)

**Would morning or afternoon be better for you?** \_\_\_\_\_

**Early part of the week or later part work better for you?** \_\_\_\_\_

**Close:( Repeat appointment time & day & ask- will you be here?)** \_\_\_\_\_

**Research Summary: (Notes for morning HUDDLE)** \_\_\_\_\_  
\_\_\_\_\_  
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