

## NEW PATIENT INTAKE INFORMATION

Today's date:	Call taken by:
Step 1. Warm, patient, and calm greeting given?	
Step 2. Caller's name: Patient's name:	
Step 3. Patient's chief complaint:	
Step 4. Reassured caller that office is great and can address chief complaint?	
Step 5. Appointment scheduled Date: Time:	
Step 6. Office location verified?	
Step 7. Obtain patient contact info: Patient name:  Address:  Phone number:  E-mail address:  Dental benefit Info:	
Step 8. Patient's referral source:  Scheduling any additional family members?	
Step 9. Final instructions given and confirmed appointment day and time?	
Any additional conversation notes:	