

## SAMPLE PHONE FLOW For New Patient CALL IN

(This Script is Specifically Catered to a New Patient Inquiring If You Accept Their Insurance.  
It can easily be adapted for any other type of practice or scenario)

Edit as needed for your doctor and practice [i.e. DC Accolades section]

### PICK UP BEFORE 3<sup>rd</sup> RING:

CA introduces self and practice extremely friendly -  
(i.e. "Thank you for calling Smith Family Chiropractic. This is Jenna, how can I help you?")

**Patient:** "Do you take XYZ insurance??" [or "What insurances do you take??"]

**CA:** "We offer ALL new patients a complimentary first consult with Dr. Smith to see if he can help you get the results you're looking for. If he feels he can help you then you can proceed with a full exam the same day and your coverage varies depending on your plan. If he doesn't feel he can get you the best results, he'll refer you to who he believes can in town. Were you referred to us from a local doctor or a patient of ours?"

**Patient:** "Online."

**CA:** "Oh interesting! Most of our patients are referrals because Dr. Smith (**SHARE DC ACCOLADES & VALUE:** # of Years in community, certifications, honors, specialties in cases or conditions, etc.)  
Did you see all of our 5-star reviews online??"

**Patient:** Doesn't matter how they respond here, even if they just give you a "No".

<< NOW Get patient's details before proceeding (full name, cell phone and email address) >>

**CA:** "And why are you looking to schedule a consult with Dr. Smith?"

**Patient:** "My back is killing me...!"

**CA:** [**Mini 3 Essentials MUST DO**] "I'm sorry to hear your back is killing you! I'm sure that's frustrating and you want to get relief right away and better as soon as possible. We take care of SO MANY patients with back pain and get really great results in usually short amounts of time. Let's get you scheduled for a complimentary consult this week. The soonest I can get you in is today at 4pm as we've had an opening."

**Patient:** "So how much does it cost after the free consultation? Am I going to get a treatment today? Will my insurance pay for that??"

**CA:** "After your free consultation, if the doctor believes he can help you and you want to move forward with the exam it is \$X. We'll provide you a receipt to send in to your insurance for direct reimbursement. Your insurance coverage depends on your specific plan and no office knows your exact benefits without calling to check. Insurance has been getting worse and worse over the years and these days it sometimes covers next to nothing even when you have it. Sometimes your co-pay is even more than a normal office visit. So, we've created treatment savings options for patients because of this.  
[NEVER use the word "super bill" instead of receipt]

**Patient:** "But am I going to get a treatment today? I really need to get treated today."

# PATIENT MASTERY

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**CA:** “If the doctor feels he can help you, yes, it IS possible to get treated the SAME day. Does 4 o’clock work for your initial consult with Dr. Smith?”

## **After:**

Make sure email is sent out with all information for their appointment needs and summary leadership statement of what they’ll expect on this first visit.

Patient should get automated text reminder 1 day before and morning of 1<sup>st</sup> visit.

## **Always Include:**

- ❖ Doctor Accolades and Value
- ❖ 3 Essentials Response to WHY Scheduling Appointment
- ❖ 3 Step New Patient Process Using “IF” 2x to Reinforce Process
- ❖ Never say “Superbill” [use Receipt, instead] or anything that sounds odd to patients  
[i.e. Caller complains of neck pain and CA asks “Is this visit for you or your entire family?”]
- ❖ Focus on Having Availability for New Patient Appointments Sooner Than Later  
[i.e. A wait list practice is a BAD business model]

## **IF You’re Experiencing New Patients No-Shows:**

Take a cc # to hold appointment EVEN for a complimentary consult.

This should be built into script so it’s easy for front desk to say it’s a requirement in order to reserve a free consultation with the doctor.

It is only billed if a no-show or same day cancellation [exam rate fee for instance].

\*If someone won’t give a doctor’s office a CC, don’t expect them to invest in care.

Don’t initiate this unless your CA is 100% on board that this makes sense to do, otherwise their uncertainty will be felt by caller and person will not feel comfortable.