



# 1-PAGE CALL REFERENCE SHEET *Ideas*

## LOCATION INFORMATION

- Address
- Basic directions (Also notable nearby landmarks, what's next door, what the office looks like)
- Parking and access
- Hours of operation
- Phone and fax numbers

## FINANCIAL

- In-network insurance list
- Insurance accepted but out of network
- Be able to explain to patients the difference between in and out of network. When they ask, "Do you accept my insurance?" they usually mean, "Are you in network?"
- General info about financing options (CareCredit, in-house payment plans, etc)
- In-house savings/membership plan, if applicable
- Any new patient specials (Make your team aware of current marketing endeavors.)
- Have a plan for when people call asking for price quotes. We suggest having a broad range available for the main services, and explaining to callers that they'd need to come in for a consultation to get an exact price quote for the needed services. Have the exact numbers for a new patient visit.

## SERVICES

- New patient visit info (What it entails, how long to plan for, info for special cases such as patients with special needs or pregnant women)
- Basic list of services to refer, particularly for calls about "specialty" services (ex: dentures, implants, mini implants, ortho, oral surgery, etc)
- If you refer out for any specific service(s), the name and phone number of your referral practice can come in handy.

## DOCTOR(S)

- Name(s)
- Education and credentials
- A few professional facts, including when the doctor started practicing and how long the current location has been open