

SMS Templates

- **Post phone call + VM:**

- Hey there [patient's name] that was me who just called you! This is [your name] from [practice name]! How is everything going?

- **After Patient Responds to Post Phone call + VM text:**

- Awesome! I was just calling because I see here that you requested a free consult for possibly looking at Braces or Invisalign treatment with [doctor name], is that right?

I just wanted to help you get that scheduled! Is there a day and time that works best for you to come in? Or when could be a good time to call you back to schedule?

Looking forward to meeting you!

- **Follow-up text when they are unresponsive after 48-72 hours:**

- Hey there [patient's name] this is [your name] from [practice name]! How are you?

Just wanted to touch base real quick and see if you still might want to come in for a free consult for Braces or Invisalign treatment with [doctor name]?

Looking forward to hearing from you soon! 😊

- **What to say after patient responds Yes to schedule - appointment is for / CHILD:**

- Okay! Has the child had a routine dental cleaning within the last 6 months at his or her primary dental office?

- **What to say after patient responds Yes to schedule - appointment is for / SELF:**

- Okay! Have you had a routine dental cleaning within the last 6 months at your primary dental office?

- **If NOT up to date on cleaning:**

- Unfortunately, we are unable to schedule an orthodontic consultation without an up-to-date cleaning, but once you have that taken care of, definitely message me back at this number and we can definitely get you put on the schedule! If you are looking for a primary dentist currently we recommend a general dentist that is located right next door to our office, the name of the office is, [referral office]

name], their phone number is [phone number], and the name of the doctor at the office is [doctor name]! Looking forward to meeting you

- **If patient asks what an initial exam/consult is:**

- Your initial exam includes us taking some records - we will take some photos, some X-rays, and a digital scan for the doctor to look at. Then the doctor will do an exam to determine if treatment is recommended, and if so, how long you will need to be in treatment. This initial consult appointment is free of charge, at no cost to you. Then, our awesome treatment coordinator will go over your dental insurance, discuss your Orthodontic coverage/benefits, and the costs for your treatment plan. At that point, if it feels appropriate to you, and you feel ready, we can schedule your appointment to start your treatment! Most of the time, as a convenience to you to save you time, we can even get you into the clinic to start treatment that same day, so that you do not have to come back for another appointment!

- **Same-day appointment confirmation text:**

- Hey there [patient's name] it's [your name] at [practice name]! We are looking forward to seeing you today!

Do you have our address, or would you like me to text it to you real quick so you can easily just click it when you get in the car?

- **If they ask about fees//price:**

- We strive for high-quality orthodontic treatment, that's easy, convenient, and affordable for you!

Although I don't know exactly what your cost would be, as it varies depending on your time in treatment - I do know that we have super affordable payment plans!

All at 0% interest, no credit checks, and regardless of how long your treatment is, you are able to get started for just [insert downpayment]...possibly even less. Is that something that might work for you?

- **If they have Medicaid and you do not accept Medicaid:**

- Hey there! Unfortunately, we do not accept Medicaid as a form of insurance. We would recommend you calling (referral office) office at (phone number) as they do accept Medicaid. Just something to keep in mind - although you may have orthodontic benefits in your plan, very few cases actually qualify to get your treatment cost covered with Medicaid. After you go to (referral office), if they tell you that your case was denied by Medicaid, they will most likely give you a cash/out of pocket treatment quote. After you get that cash quote, definitely call us back and we can get you in for an appointment to see if we can beat that

quoted fee for you! Hope you have a great day and feel free to let me know if you have any questions in the process.