

***Consult*** is a Process and Relationship Management tool specifically designed for Medical Practices:

- Track Marketing Sources
- Follow-up on Opportunities
- Make Presentations that improve Close Rates
- Utilize Contact and Script tools to simplify the Follow-up Process

New Patient	Recall Records	Find Patient	Save Record	Huddle Sheet	Place Call	Incoming Call	Sched. Activity	Pending Tasks	Quit
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**Consult**  
by Patient Concepts

Patient			
Address			
City	St	Zip	
Phone Hm.	- -	Wk.	- - X
Cell	- -		
Email			DOB

Counselor	ROBERT JONES
Office	SUNRISE LA
Doctor	DR. JAMES JOHNSON

Co-Managed ☐

Type	BODY CONTC	Status	INQUIRY	11/29/07 4:43 pm
Source				

Discount		Rate	
Cash Discount	3 %	<input checked="" type="checkbox"/> Show Cash Discount	
Insurance	\$ 0		

Date Option 1	Date Option 2	Inquiry	Appt. Set	Consult	Schedule	Surgery	Initial Date
							11/29/2007

Procedures

Presentation

Pending Activities

History / Notes

Outcome

Select / Add

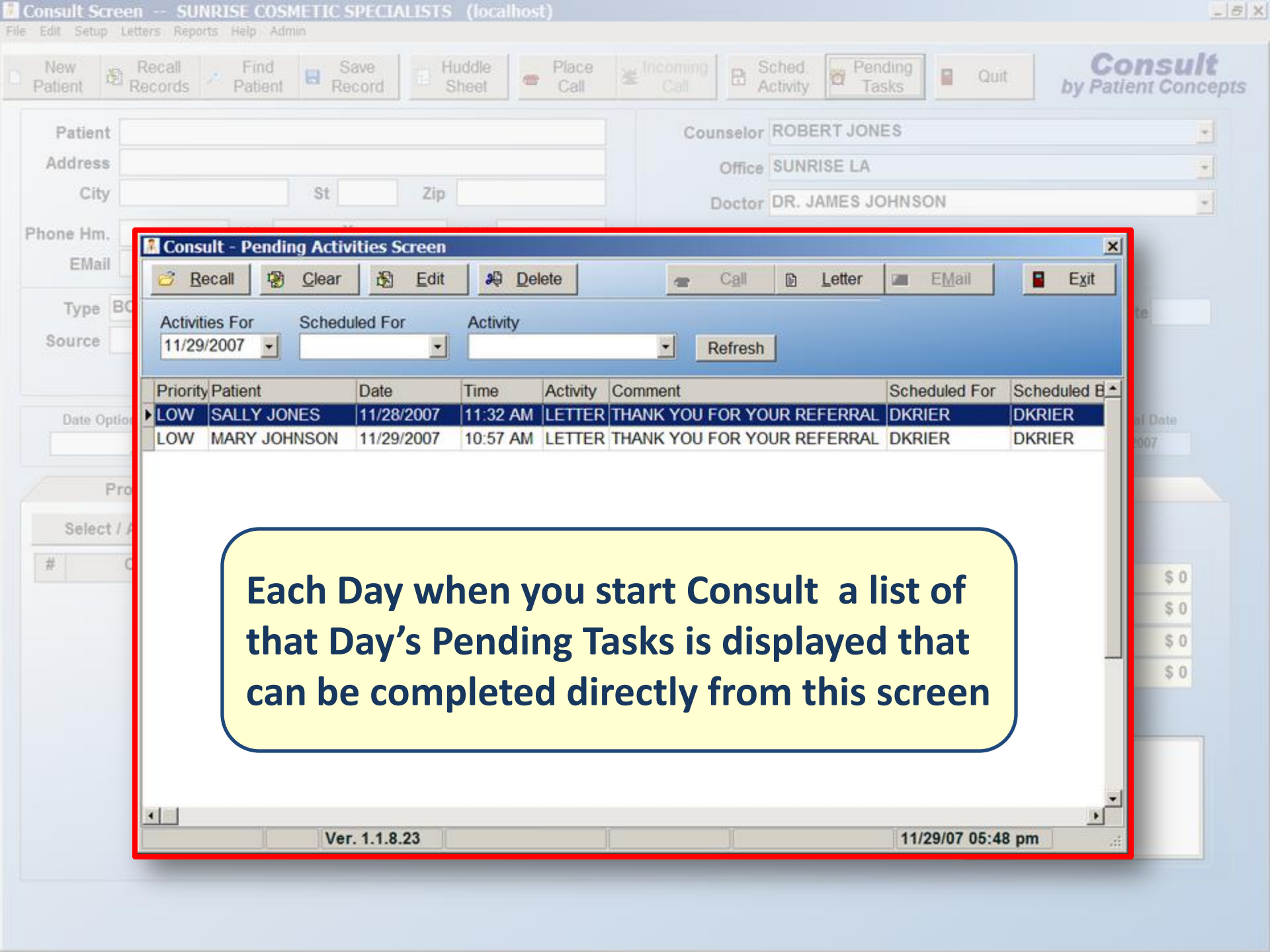
Calc. Payments

#	Category	Procedure	Price
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Sub Total	\$ 0
Discount	\$ 0
Insurance	\$ 0
Patient Portion	\$ 0

Presentation Note

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Each Day when you start Consult a list of that Day's Pending Tasks is displayed that can be completed directly from this screen

New Patient	Recall Records	Find Patient	Save Record	Huddle Sheet	Place Call	Incoming Call	Sched. Activity	Pending Tasks	Quit
-------------	----------------	--------------	-------------	--------------	------------	---------------	-----------------	---------------	------

**Consult**  
by Patient Concepts

Patient	SARAH WILSON		
Address	123 OAK ST		
City	CAMARILLO	St	CA Zip 93010
Phone Hm.	888-555-1212	Wk.	888-777-1212 X123 Cell 888-888-1212
EMail	sarah.wilson@someisp.net		DOB 10/15/1952

Counselor	ROBERT JONES
Office	SUNRISE LA
Doctor	DR. JAMES JOHNSON

Co-Managed ☐

Type	BODY CONTC	Status	INQUIRY	11/29/07 4:43 pm
Source				

Discount		Rate	
Cash Discount	3 %	<input checked="" type="checkbox"/> Show Cash Discount	
Insurance	\$ 0		

Date Option 1	Date Option 2	Initial Date
		11/29/2007
Procedures		
Select / Add	Calc. Payments	
#	Category	
		Price
		Sub Total
		\$ 0
		\$ 0
		Insurance
		\$ 0
		Patient Portion
		\$ 0
Presentation Note		

A minimum of input enters all the important information needed for tracking and follow-up

New Patient	Recall Records	Find Patient	Save Record	Huddle Sheet	Place Call	Incoming Call	Sched. Activity	Pending Tasks	Quit	<b>Consult</b> by Patient Concepts
-------------	----------------	--------------	-------------	--------------	------------	---------------	-----------------	---------------	------	---------------------------------------

Patient	SARAH WILSON			
Address	123 OAK ST			
City	CAMARILLO	St	CA	Zip 93010
Phone Hm.	888-555-1212	Wk.	888-777-1212 X123	Cell 888-888-1212
E-Mail	sarah.wilson@someisp.net			DOB 10/16/1952

Counselor	ROBERT JONES
Office	SUNRISE LA
Doctor	DR. JAMES JOHNSON

Co-Managed ☐

Type	BODY CONTC	Status	INQUIRY	11/29/07 4:43 pm
Source	DOCTOR REFERRAL			
Detail	DR JOHN BERGSTROM			

Discount		Rate	
Cash Discount	3 %	<input checked="" type="checkbox"/> Show Cash Discount	
Insurance	\$ 0		

Date Option 1	Date Option 2	Inquiry	Appt. Set	Consult	Schedule	Surgery	Initial Date
							11/29/2007

Procedures

Presentation

Pending Activities

History / Notes

Outcome

Select / Add

Calc. Payments

#	Category
---	----------

**Sourcing Opportunities is critical to determine the success levels of your marketing programs. The Source Detail feature zeros in on specifically where or who is driving business into your Practice.**

Patient: SARAH WILSON  
 Address: 123 OAK ST  
 City: CAMARILLO St CA Zip: 93010  
 Phone Hm: 888-555-1212 Wk: 888-777-1212 X123 Cell: 888-888-  
 Email: sarah.wilson@someisp.net DOB: 10/16/19  
 Type: BODY CONTC Status: INQUIRY 11/29/07 4:4  
 Source: DOCTOR REFERRAL  
 Detail: DR JOHN BERGSTROM

Date Option 1:  Date Option 2:  Inquiry:  Appt. Se:

Procedures Presentation P  
 Select / Add Calc. Payments  
 # Category Procedure



## Automatically Generate Referral Thank You Letters

11/29/2007

Dr John Bergstrom  
2345 1st St  
Los Angeles, CA 90000

Dear Dr John Bergstrom,

I want to personally thank you for referring Sarah Wilson. We value your confidence in us and will do everything in our power to provide the positive experience that we know you expect.

If you should have any questions or concerns, please feel free to contact either Robert Jones or myself at: 805-987-0500.

Thank you again,

Sunrise Cosmetic Surgery

James Johnson

### Consult - Add Source Detail Letter

Would you like to send the following letter to Dr John Bergstrom?

THANK YOU FOR YOUR REFERRAL

☒ Yes

☐ No

New Patient	Recall Records	Find Patient	Save Record	Huddle Sheet	Place Call	Incoming Call	Sched. Activity	Pending Tasks	Quit
-------------	----------------	--------------	-------------	--------------	------------	---------------	-----------------	---------------	------

**Consult**  
by Patient Concepts

Patient	SARAH WILSON			
Address	123 OAK ST			
City	CAMARILLO	St	CA	Zip 93010
Phone Hm.	888-555-1212	Wk.	888-777-1212 X123	Cell 888-888-1212
EMail	sarah.wilson@someisp.net			DOB 10/15/1952

Counselor	ROBERT JONES
Office	SUNRISE LA
Doctor	DR. JAMES JOHNSON

Co-Managed ☐

Type	BODY CONTC	Status	INQUIRY	11/29/07 4:43 pm
Source	DOCTOR REFERRAL			
Detail	DR JOHN BERGSTROM			

Discount	LA TIMES PROMOTION	Rate	\$ 500
Cash Discount	3 %	<input checked="" type="checkbox"/> Show Cash Discount	
Insurance	\$ 0		

Date Option 1	Date Option 2	Inquiry	Appt. Set				11/29/2007
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Procedures	Presentation	Pending Activities	History / Notes	Outcome
------------	--------------	--------------------	-----------------	---------

Select / Add	Calc. Payments
#	Category

**Custom Discounts and Promotions  
can be applied on either a % or a  
Dollar basis**

Sub Total	\$ 0
Discount	\$ 500
Insurance	\$ 0
Patient Portion	-\$ 500

Presentation Note

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New Patient	Recall Records	Find Patient	Save Record	Huddle Sheet	Place Call	Incoming Call	Sched. Activity	Pending Tasks	Quit
-------------	----------------	--------------	-------------	--------------	------------	---------------	-----------------	---------------	------

**Consult**  
by Patient Concepts

Patient SARAH WILSON  
Address 123 OAK ST  
City CAMARILLO St CA  
Phone Hm. 888-555-1212 Wk. 888-777-1212 X13  
Email sarah.wilson@someisp.net

Counselor ROBERT JONES

Office SUNRISE LA

Doctor DR. JAMES JOHNSON

The Procedures Tab is use to specify  
the Procedures requested by the  
prospective Patient

Type BODY CONTC Status INQUIRY Date \$ 500  
Source DOCTOR REFERRAL  
Detail DR JOHN BERGSTROM

Date Option 1 Date Option 2 Inquiry Initial Date 11/29/2007

**Procedures****Presentation****Pending Activities****History / Notes****Outcome****Select / Add****Calc. Payments**

#	Category	Procedure	Price
---	----------	-----------	-------

Sub Total \$ 0

Discount \$ 500

Insurance \$ 0

Patient Portion -\$ 500

**Presentation Note**

New Patient Recall Records Find Patient Save Record

Huddle

Place

Incoming

Sched.

Pending

Quit

**Consult**  
Concepts

Patient SARAH WILSON

Address 123 OAK ST

City CAMARILLO St CA

Phone Hm. 888-555-1212 Wk. 888-777-1212 X12

Email sarah.wilson@someisp.net

Type BODY CONTC Status INQUIRY

Source

Discount LA TIMES PROMOTION

Rate \$ 500

Discount

Initial Date

11/29/2007

Outcome

Sub Total \$ 0

Discount \$ 500

Insurance \$ 0

Portion -\$ 500

ation Note

Click to select Procedures. Individual  
Prices can be instantly changed on the  
fly when needed

**Consult - Procedures Screen**

Save Cancel

Selected	Procedure	Net	Changed	Price
Category : BODY CONTOURING				
<input type="checkbox"/>	ABDOMINOPLASTY			\$ 8,000
<input type="checkbox"/>	BRACHIOPLASTY			\$ 6,000
<input type="checkbox"/>	BUTTOCK LIFT			\$ 7,000
<input checked="" type="checkbox"/>	LIPO ABDOMEN			\$ 4,000
<input checked="" type="checkbox"/>	LIPO ARMS			\$ 3,500
<input type="checkbox"/>	LIPO BUTT/THIGHS			\$ 7,000
<input type="checkbox"/>	LIPO BUTTOCKS			\$ 4,000
<input checked="" type="checkbox"/>	LIPO CHIN			\$ 3,000
<input type="checkbox"/>	LIPO NECK			\$ 3,500
<input type="checkbox"/>	LIPO THIGHS			\$ 4,000
<input type="checkbox"/>	LOWER BODY LIFT			\$ 18,000
<input type="checkbox"/>	THIGH LIFT			\$ 7,000
Category : BREAST ENHANCEMENT				
Category : CONSULT				
Category : FACIAL REJUVENATION				

New Patient Recall Records Find Patient Save Record

Huddle Sheet

Place Call

Incoming Call

Sched. Activity

Pending Tasks

Quit

**Consult**  
by Patient Concepts

Patient: SARAH WILSON  
Address: 123 OAK ST  
City: CAMARILLO St CA  
Phone Hm. 888-555-1212 Wk. 888-777-1212 X1  
Email: sarah.wilson@someisp.net  
Type: BODY CONTC Status: INQUIRY  
Source: DOCTOR REFERRAL  
Detail: DR JOHN BERGSTROM

Counselor: ROBERT JONES

Office: SUNRISE LA

Doctor: DR. JAMES JOHNSON

This example shows the results once  
the Procedures have been determined  
and selected

ate \$ 500

Date Option 1

12/04/2007

Date Option 2

12/07/2007

Inquiry

11/29/2007

Appt. Set

Consult

Schedule

Surgery

Initial Date

11/29/2007

Procedures

Presentation

Pending Activities

History / Notes

Outcome

Select / Add

Calc. Payments

#	Category	Procedure	Price
1	BODY CONTOURING	Liposuction of Abdomen	4,000
2	BODY CONTOURING	Liposuction of Arms	3,500
3	BODY CONTOURING	Liposuction of Chin	3,000

Sub Total \$ 10,500

Discount \$ 500

Insurance \$ 0

Patient Portion \$ 10,000

Presentation Note

New Patient Recall Records Find Patient Save Record

Huddle Sheet

Place Call

Incoming Call

Sched. Activity

Pending Tasks

Quit

**Consult**  
by Patient Concepts

Patient: SARAH WILSON  
Address: 123 OAK ST  
City: CAMARILLO St CA  
Phone Hm. 888-555-1212 Wk. 888-777-1212 X1  
Email: sarah.wilson@someisp.net

Type: BODY CONTC Status: INQUIRY  
Source: DOCTOR REFERRAL

Detail: DR JOHN BERGSTROM

The Presentation Tab is used to specify finance alternatives that are easily customized based upon the requirements of the Practice

Date Option 1

12/04/2007

Date Option 2

12/07/2007

Inquiry

11/29/2007

Appt. Set

Consult

Schedule

Surgery

Initial Date

11/29/2007

Procedures

Presentation

Pending Activities

History / Notes

Outcome

Print Presentation

Approval Status: APPROVED

Approval Date: 11/29/2007

☒ Show Payments - Section #1

0% INHOUSE FINANCING

Rate: 0.00 %

Down %	Down \$	3 Months	6 Months	9 Months	12 Months
0 %	\$ 0	\$ 3,333	\$ 1,667	\$ 1,111	\$ 833
10 %	\$ 1,100	\$ 2,967	\$ 1,483	\$ 989	\$ 742
20 %	\$ 2,100	\$ 2,633	\$ 1,317	\$ 878	\$ 658
30 %	\$ 3,200	\$ 2,267	\$ 1,133	\$ 756	\$ 567

☒ Show Payments - Section #2

CAPITAL ONE

Rate: 11.90 %

Down %	Down \$	18 Months	24 Months	36 Months	48 Months
0 %	\$ 0	\$ 609	\$ 470	\$ 332	\$ 263
10 %	\$ 1,100	\$ 542	\$ 419	\$ 295	\$ 234
20 %	\$ 2,100	\$ 481	\$ 372	\$ 262	\$ 208
30 %	\$ 3,200	\$ 414	\$ 320	\$ 226	\$ 179

New Patient Recall Records Find Patient Save Record Huddle Sheet Place Call

Patient: SARAH WILSON

Address: 123 OAK ST

**Consult** provides a detailed professional presentation that helps the Counselor review the Procedures and various financing options with the Patient. Providing "Choices" improves success rates



## SUNRISE COSMETIC SURGERY

12345 MAIN ST  
LOS ANGELES, CA 90000  
805-987-0500

Specifically Prepared for:

SARAH WILSON

November 29, 2007 5:10 pm

DR. JAMES JOHNSON

Counselor: ROBERT JONES

Description	Amount
Liposuction of Abdomen	4,000.00
Liposuction of Arms	3,500.00
Liposuction of Chin	3,000.00
<b>Total</b>	<b>\$10,500.00</b>
Less La Times Promotion	\$500.00
<b>Net Patient Investment</b>	<b>\$10,000.00</b>

Date Preference: ☐ Tue 12/04/2007☐ Fri 12/07/2007☐

**1** Credit Card / Debit Card / Finance Option \$10,000.00

**2** Discount for Cash/Check (3% Discount = \$300.00) \$9,700.00

**3** 0% INHOUSE FINANCING

Down Payment	3 Months	6 Months	9 Months	12 Months
\$0	\$3,333	\$1,667	\$1,111	\$833
\$1,100	\$2,967	\$1,483	\$989	\$742
\$2,100	\$2,633	\$1,317	\$878	\$658
\$3,200	\$2,267	\$1,133	\$756	\$567

This example is based on 0% APR. Payments are estimates, your actual payment and interest rate may vary based upon credit history and finance source requirements. This information is provided strictly as an example of possible finance alternatives and is subject to finance source review and approval.

**4** CAPITAL ONE

Down Payment	18 Months	24 Months	36 Months	48 Months
\$0	\$609	\$470	\$332	\$263
\$1,100	\$542	\$419	\$295	\$234
\$2,100	\$481	\$372	\$262	\$208
\$3,200	\$414	\$320	\$226	\$179

This example is based on 11.9% APR. Payments are estimates, your actual payment and interest rate may vary based upon credit history and finance source requirements. This information is provided strictly as an example of possible finance alternatives and is subject to finance source review and approval.

Patient Signature: \_\_\_\_\_ Date: \_\_\_\_\_

New Patient Recall Records Find Patient Save Record

Huddle Sheet

Place Call

Incoming Call

**Sched. Activity**

Pending Tasks

Quit

**Consult**  
by Patient Concepts

Patient: SARAH WILSON  
 Address: 123 OAK ST  
 City: CAMARILLO St CA Zip: 93010  
 Phone Hm. 888-555-1212 Wk. 888-777-1212 X123 Cell 888-888-4444  
 Email sarah.wilson@someisp.net DOB 10/15/1985  
 Type BODY CONTC Status INQUIRY 11/29/07 4:43  
 Source DOCTOR REFERRAL  
 Detail DR JOHN BERGSTROM

Date Option 1 12/04/2007 Date Option 2 12/07/2007 Inquiry 11/29/2007 Appt. Set

Procedures Presentation  
 + Add Edit Cancel Clear

Activity	Comment	Cou
LETTER	THANK YOU FOR YOUR REFERRAL	ROBERT

**Consult - Activity Screen**

Activity: SURGERY Priority: High  
 Regarding: Los Robles Hospital  
 Date: 12/6/2007 Time: 07:00 am  
 Duration: 240 (minutes)  
 Scheduled For: DKRIER  
 Scheduled By: DKRIER  
 Comment:  
☐ Show All Pending Activities

**Pending Activities for: Thursday 12/06/2007**

Activity	Date	Time	Comment	Completed

Activities and future reminders are easily scheduled for Appointments, Consults, Surgery, Phone Follow-up, Reminders, etc.

**Consult** automatically asks if you want to schedule a Confirmation Call on the day before an Appointment.

This increases show rates.

Consult Screen -- SUNRISE COSMETIC SPECIALISTS (localhost)

File Edit Setup Letters Reports Help Admin

New Patient Recall Find Save Huddle Place Incoming Sched. Activity Pending Tasks Quit Consult by Patient Concepts

SARAH WILSON Counselor ROBERT JONES

High

December 2007

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Today

Show All Pending Activities

Comment

Procedures Presentation

Add Edit Cancel Clear

Activity	Comment
LETTER	THANK YOU FOR YOUR REFERRAL

Activity

Activity

Consult - Confirmation Call

Would you like to add a confirmation call on:

Date 12/05/2007  
Wednesday

Time 2:00 pm

Script APPOINTMENT CONFIRMATION CA

Yes No

New Patient	Recall Records	Find Patient	Save Record	Huddle Sheet	Place Call	Incoming Call	Sched. Activity	Pending Tasks	Quit
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**Consult**  
by Patient Concepts

Patient	SARAH WILSON	Counselor	ROBERT JONES
Address	123 OAK ST		
City	CAMARILLO	St	CA
Zip	93010		
Phone Hm.	888-555-1212	Wk.	888-777-1212
Email	sarah.wilson@someisp.net		
Type	BODY CONTC	Status	INQU
Source	DOCTOR REFERRAL		
Detail	DR JOHN BERGSTROM		
		Insurance	

The Pending Activities Tab displays any Phone Contact, Letters, Email or Reminder items that are Pending

Date Option 1	Date Option 2	Inquiry	Appt. Set	Co	Schedule	Surgery	Initial Date
12/04/2007	12/07/2007	11/29/2007					11/29/2007

Procedures	Presentation	Pending Activities	History / Notes	Outcome
+ Add	▲ Edit	✕ Cancel	✓ Clear	
		☎ Call	✉ Letter	✉ Email

Activity	Comment	Counselor	Date	Time
▶ LETTER	THANK YOU FOR YOUR REFERRAL	ROBERT JONES	11/29/2007	04:48 PM
PHONECALL	APPOINTMENT CONFIRMATION CALL	ROBERT JONES	12/05/2007	02:00 PM
SURGERY	Los Robles Hospital	ROBERT JONES	12/06/2007	07:00 AM

Activity Note

Patient: SARAH WILSON  
Address: 123 OAK ST  
City: CAMARILLO St CA Zip: 93010  
Phone Hm: 888-555-1212 Wk: 888-777-1212 X1  
Email: sarah.wilson@someisp.net  
Type: BODY CONTC Status: INQUIRY  
Source: DOCTOR REFERRAL  
Detail: DR JOHN BERGSTROM

Counselor: ROBERT JONES

DOB: 11/15/1952  
Insurance: \$0

Rate: \$ 500

Phone Contact is generated by selecting the Call Button which launches the **Consult** Call Center

Date Option 1: 12/04/2007 Date Option 2: 12/07/2007 Inquiry: 11/29/2007 Appt. Set: Consult: Schedule: Surgery: Initial Date: 11/29/2007

Procedures		Presentation		Pending Activities		History / Notes		Outcome	
+ Add		▲ Edit		✕ Cancel		✓ Clear			
				Call		Letter		Email	
Activity	Comment	Counselor	Date	Time	Activity Note				
LETTER	THANK YOU FOR YOUR REFERRAL	ROBERT JONES	11/29/2007	04:48 PM					
▶ PHONECALL	APPOINTMENT CONFIRMATION CALL	ROBERT JONES	12/05/2007	02:00 PM					
SURGERY	Los Robles Hospital	ROBERT JONES	12/06/2007	07:00 AM					

Consult - Call Center

Save/Next Save Cancel Letter Schedule Activity History

**Patient**  
SARAH WILSON  
123 OAK ST, CAMARILLO, CA, 93010

**Phone**  
Home: 888-555-1212  
Cell: 888-888-1212  
Work: 888-777-1212 x123

**Procedures**  
BODY CONTOURING: Liposuction of Abdomen, Liposuction of Arms, Liposuction of Chin

**Source:** DOCTOR REFERRAL  
**Detail:** DR JOHN BERGSTROM  
**Discount:** LA TIMES PROMOTION - \$500.00

**Total:** \$10,000.00

**APPOINTMENT CONFIRMATION CALL** Show Script

Call Status

**Note**

Activity	Comment	Counselor	Date	Time	Completed	Status	Result
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The Consult Call Center puts all of the critical information at your fingertips to help facilitate Phone Contact.

We can use the Script function in **Consult** to help make sure our people say the right things

Consult - Script Center

Save/Exit

Cancel

Office Info

Schedule Activity

History

Name

SARAH WILSON

Home

888-555-1212

Source

DOCTOR REFERRAL

E-Mail

SARAH.WILSON@SOMEISP.NET

Cell

888-888-1212

Source Detail

DR JOHN BERGSTROM

BODY CONTOURING: Liposuction of Abdomen, Liposuction of Arms, Liposuction of Chin

Total: \$10,000.00

#

QUESTION (Short)

1

GREETING

2

LEAVE VOICE MESSAGE

3

APPOINTMENT DATE/TIME

4

HAVE RIDE HOME?

5

NEED DIRECTIONS?

6

RESCHEDULE

7

FINISH

QUESTION

Hi this is Robert Jones from Sunrise Cosmetic Surgery.

May I please speak with Sarah Wilson?

This is an example of the **Consult** Script feature.

RESPONSE (Please select 1 )

☐ Speaking

☐ Not Here

☐ Voice Mail

☐ Wrong No.

☐ Busy

COMMENT

Previous Question

Next Question

Consult - Script Center

Save/Exit

Cancel

Office Info

Schedule Activity

History

Name

SARAH WILSON

Home

888-555-1212

Source

DOCTOR REFERRAL

EMail

SARAH.WILSON@SOMEISP.NET

Cell

888-888-1212

Source Detail

DR JOHN BERGSTROM

BODY CONTOURING: Liposuction of Abdomen, Liposuction of Arms, Liposuction of Chin

Total: \$10,000.00

# QUESTION (Short)

1 GREETING

2 LEAVE VOICE MESSAGE

3 APPOINTMENT DATE/TIME

4 HAVE RIDE HOME?

5 NEED DIRECTIONS?

6 RESCHEDULE

7 FINISH

QUESTION

Hi this is Robert Jones from Sunrise Cosmetic Surgery.

May I please speak with Sarah Wilson?

Custom scripts with Practice and Patient information automatically merged helps reduce the likelihood that the call will sound scripted

RESPONSE (Please select 1 )

☐ Speaking

☐ Not Here

☐ Voice Mail

☐ Wrong No.

☐ Busy

COMMENT

Previous Question

Next Question

Consult - Script Center

Save/Exit

Cancel

Office Info

Schedule Activity

History

Name

SARAH WILSON

Home

888-555-1212

Source

DOCTOR REFERRAL

EMail

SARAH.WILSON@SOMEISP.NET

Cell

888-888-1212

Source Detail

DR JOHN BERGSTROM

BODY CONTOURING: Liposuction of Abdomen, Liposuction of Arms, Liposuction of Chin

Total: \$10,000.00

#

QUESTION (Short)

1

GREETING

2

LEAVE VOICE MESSAGE

3

APPOINTMENT DATE/TIME

4

HAVE RIDE HOME?

5

NEED DIRECTIONS?

6

RESCHEDULE

7

FINISH

QUESTION

Hi this is Robert Jones from Sunrise Cosmetic Surgery.

May I please speak with Sarah Wilson?

Responses can automatically branch to the next section and comments can be entered at any time

RESPONSE (Please select 1 )

☐ Speaking

☐ Not Here

☐ Voice Mail

☐ Wrong No.

☐ Busy

COMMENT

Previous Question

Next Question

Consult - Call Center

Save/Next Save Cancel Letter Schedule Activity History

**Patient**  
 SARAH WILSON  
 123 OAK ST, CAMARILLO, CA, 93010

**Phone**  
 Home: 888-555-1212  
 Cell: 888-888-1212  
 Work: 888-777-1212 x123

**Procedures**  
 BODY CONTOURING: Liposuction of Abdomen, Liposuction of Arms, Liposuction of Chin

**Source:** DOCTOR REFERRAL  
**Detail:** DR JOHN BERGSTROM  
**Discount:** LA TIMES PROMOTION - \$500.00

**Total:** \$10,000.00

APPOINTMENT CONFIRMATION CALL Show Script

**Call Status** CALL COMPLETED

**Call Result** APPOINTMENT CONFIRMED

**Note**

Activity	Comment	Counselor	Date	Time	Completed	Status	Result
SCRIPT CALL	APPOINTMENT CONFIRMATION	ROBERT JONES	12/5/2007	2:00:00 P	11/29/2007 5:30:11		
GREETING: Speaking APPOINTMENT DATE/TIME: Okay HAVE RIDE HOME?: Yes NEED DIRECTIONS?: No FINISH: "Sarah's Husband will be bringing her to the Hospital. Went over all of the Pre-Op requirements and confirmed that she will not have anything by mouth after 11:00 PM the day before surgery."							

This example shows the results of the Call at which point we can enter a Call Status and Call Result by selecting them from a drop down list

New Patient	Recall Records	Find Patient	Save Record	Huddle Sheet	Place Call	Incoming Call	Sched Activity	Pending Tasks	Quit
-------------	----------------	--------------	-------------	--------------	------------	---------------	----------------	---------------	------

**Consult**  
by Patient Concepts

Patient	SARAH WILSON		Counselor	ROBERT JONES	
Address	123 OAK ST		Office	SUNRISE LA	
City	CAMARILLO	St	CA		
Phone Hm.	888-555-1212	Wk.	888-777-1212	X1	
E-Mail	sarah.wilson@someisp.net				
Type	BODY CONTC	Status	INQUIRY	Promotion	
Source	DOCTOR REFERRAL				
Detail	DR JOHN BERGSTROM				
Date Option 1	12/04/2007	Date Option 2	12/07/2007	Inquiry	11/29/2007
Appt. Set		Consult		Schedule	
Initial Date	11/29/2007				

The History / Notes Tab displays the information related to any Customer contact that has occurred



Procedures	Presentation	Pending Activities	History / Notes	Outcome			
Add Note	Edit	Delete					
Activity	Comment	Counselor	Date	Time	Completed	Status	Result
LETTER	THANK YOU FOR YOUR REFE	ROBERT JONES	11/29/2007	04:48 PM	11/29/2007 05:33 PM		
SCRIPT CALL	APPOINTMENT CONFIRMATIO	ROBERT JONES	12/05/2007	02:00 PM	11/29/2007 05:32 PM	CALL COMPLETED	APPOINTMENT CON
GREETING: Speaking APPOINTMENT DATE/TIME: Okay HAVE RIDE HOME?: Yes NEED DIRECTIONS?: No FINISH: "Sarah's Husband will be bringing her to the Hospital. Went over all of the Pre-Op requirements and confirmed that she will not have anything by mouth after 11:00 PM the day before surgery."							

New Patient   Recall Records   Find Patient   Save Record   Huddle Sheet

Patient: **SARAH WILSON**  
 Address: 123 OAK ST  
 City: CAMARILLO St CA Zip 93010  
 Phone Hm. 888-555-1212 Wk. 888-777-1212 X123 Cell 888-888-  
 Email sarah.wilson@someisp.net DOB 10/15/19  
 Type BODY CONTC Status INQUIRY 11/29/07 4:4  
 Source DOCTOR REFERRAL  
 Detail DR JOHN BERGSTROM  
 Date Option 1 12/04/2007 Date Option 2 12/07/2007 Inquiry 11/29/2007 Appt. S

Procedures Presentation  
 Add Note Edit Delete

Activity	Comment	Counselor
LETTER	THANK YOU FOR YOUR REFE	ROBERT JONES
SCRIPT CALL	APPOINTMENT CONFIRMATIO	ROBERT JONES
GREETING: Speaking APPOINTMENT DATE/TIME: Okay HAVE RIDE HOME?: Yes NEED DIRECTIONS?: No FINISH		

11/29/2007 5:35 pm

Page: 1

## Patient Information

SARAH WILSON  
 123 OAK ST  
 CAMARILLO, CA 93010  
 Home: 888-555-1212  
 Cell: 888-888-1212  
 Work: 888-777-1212 x123  
 Email: sarah.wilson@someisp.net

## Office Information

Office: SUNRISE COSMETIC SURGERY  
 Doctor: DR. JAMES JOHNSON  
 Counselor: ROBERT JONES  
 Date Added: 11/29/2007 4:42:09 PM  
 Patient Type:  
 Source: DOCTOR REFERRAL  
 Source Detail: DR JOHN BERGSTROM

## Co-Management Information

(None)

## Discounts Offered

LA TIMES PROMOTION = \$500.00  
 Cash Discount 3% = \$300.00

Description	Amount
Liposuction of Abdomen	4,000.00
Liposuction of Arms	3,500.00
Liposuction of Chin	3,000.00
Total	\$10,500.00
Less La Times Promotion	\$500.00
Net Patient Investment	\$10,000.00

## Pending Activities

SURGERY Los Robles Hospital ROBERT JONES 12/06/2007 7:00 AM

## History

LETTER THANK YOU FOR YOUR REFERRAL ROBERT JONES 11/29/2007 4:48 PM  
 Completed: 11/29/2007 05:33 PM

SCRIPT CALL APPOINTMENT CONFIRMATION CA ROBERT JONES 12/05/2007 2:00 PM  
 Completed: 11/29/2007 05:32 PM CALL COMPLETED APPOINTMENT CONFIRMED  
 GREETING: Speaking  
 APPOINTMENT DATE/TIME: Okay  
 HAVE RIDE HOME?: Yes  
 NEED DIRECTIONS?: No  
 FINISH: "Sarah's Husband will be bringing her to the Hospital. Went over all of the Pre-Op requirements and confirmed that she will not have anything by mouth after 11:00 PM the day before surgery."

Detailed Patient Information can be  
 printed for review by the Doctor or to  
 help facilitate follow-up calls made in  
 the evening

## Detailed Timeline is created automatically as you complete Activities or change the Status




Discount LA TIMES PROMOTION Rate \$ 500

Cash Discount 3 % Cash Discount

Insurance \$ 0

Date Option 1	Date Option 2	Inquiry	Appt. Set	Consult	Schedule	Surgery	Initial Date
12/04/2007	12/07/2007	11/29/2007	11/29/2007	11/29/2007	11/29/2007		11/29/2007

### Outcome

 Add Note  Edit  Delete

Activity	Comment	Counselor	Date	Time	Completed	Status	Result
NOTE	STATUS CHANGED	ROBERT JONES	11/29/2007	05:43 PM	11/29/2007 05:43 PM		
	STATUS CHANGED FROM: INQUIRY TO: SCHEDULED						
LETTER	THANK YOU FOR YOUR REFE	ROBERT JONES	11/29/2007	04:48 PM	11/29/2007 05:33 PM		
SCRIPT CALL	APPOINTMENT CONFIRMATIO	ROBERT JONES	12/05/2007	02:00 PM	11/29/2007 05:32 PM	CALL COMPLETED	APPOINTMENT CON
	GREETING: Speaking APPOINTMENT DATE/TIME: Okay HAVE RIDE HOME?: Yes NEED DIRECTIONS?: No FINISH: *Sarah's Husband will be bringing her to the Hospital. Went over all of the Pre-Op requirements and confirmed that she will not have anything by mouth after 11:00 PM the day before surgery.*						

**SOURCE REPORT**  
**SUNRISE LASER CENTERS**  
**From 10/1/2007 To 10/31/2007**

**Source: CLIPPER MAGAZINE**

Date/Time	Patient	Source	Source Detail	Status	Doctor	Office	Counselor
10/25/2007 08:38 AM	MARY SMITH	CLIPPER MAGAZINE		PENDING	DR. BILL JOHNSON	SUNRISE LOS ANGELES	MARSHALL JACOBE
10/29/2007 04:39 PM	DAVID STONE	CLIPPER MAGAZINE		SCHEDULED	DR. BILL JOHNSON	SUNRISE LOS ANGELES	MARSHALL JACOBE

Total For Detail: 2 out of 2

Total For Source: CLIPPER MAGAZINE 2 out of 30 6.7 %

**Source: DR REFERRAL**

Date/Time	Patient	Source	Source Detail	Status	Doctor	Office	Counselor
10/29/2007 04:32 PM	JOHN LONG	DR REFERRAL	DR. CHARLES COOPER	PENDING	DR. BILL JOHNSON	SUNRISE LOS ANGELES	MARSHALL JACOBE

Total For Detail: DR. CHARLES COOPER 1 out of 4

10/29/2007 04:47 PM	GARY HILL	DR REFERRAL	DR. SMITH	SCHEDULED	DR. BILL JOHNSON	SUNRISE LOS ANGELES	MARSHALL JACOBE
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Total For Detail: DR. SMITH 1 out of 4

10/28/2007 11:56 AM	JOHN WILLIAMS	DR REFERRAL	DR. WILLIAM BARKER	PENDING	DR. BILL JOHNSON	SUNRISE VAN NUYS	ROBERT JONES
10/30/2007 09:17 AM	JULIE CHAMBERLAIN	DR REFERRAL	DR. WILLIAM BARKER	SURGERY	DR. BILL JOHNSON	SUNRISE VAN NUYS	ROBERT JONES

Total For Detail: DR. WILLIAM BARKER 2 out of 4

Total For Source: DR REFERRAL 4 out of 30 13.3 %

**Source: DRIVE BY**

Date/Time	Patient	Source	Source Detail	Status	Doctor	Office	Counselor
10/29/2007 03:53 PM	ROBERT ELLIOT	DRIVE BY					MARSHALL JACOBE
10/30/2007 09:04 AM	WILLIAM ANDERSON	DRIVE BY		SURGERY	DR. BILL JOHNSON	SUNRISE LOS ANGELES	MARSHALL JACOBE

Total For Detail:

**Tracking Sources and Results is simplified  
with our Powerful Reporting Tools**