

Introduction

Patient engagement is an essential ingredient in a successful dental practice. For both general practitioners and specialties alike, it is key to creating a great experience and staying connected with your patients.

In order to meet your goal of a great patient engagement strategy, we've put together this collection of free messaging templates. This collection features a wide variety of messaging templates that will help you provide exceptional messaging to your patients.

Since it's so important to offer both text message and email to your patients, we have provided templates for both. You will also find callouts on each template, with recommendations and best practices for both general practitioners and specialties.

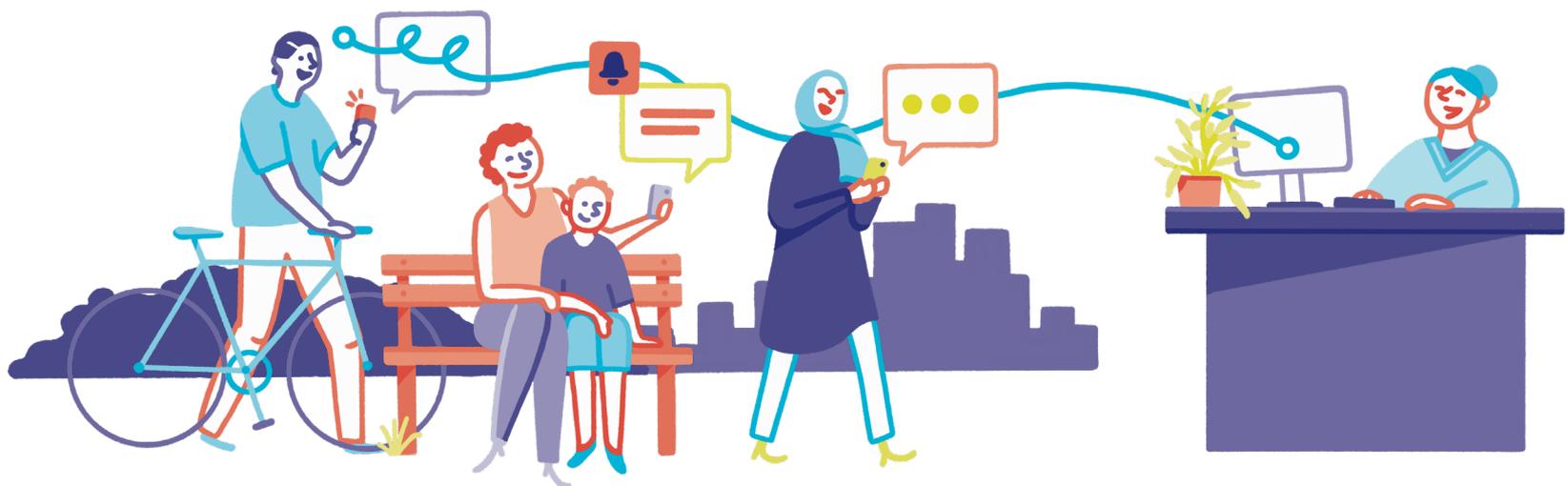


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New Patient Message Template

This is your patient's first interaction with your practice! Make it count by asking them to provide all the information necessary for their experience.

NEW PATIENT SAVE THE DATE - EMAIL



Your appointment is on:

Thursday, September 7 at 6:43am

Hi David,

Thanks for booking an appointment with us at Practice Name. We're excited to provide you with an exceptional dental experience!

This consultation is **scheduled for 30 minutes**.

If your referring dentist provided you with x-rays or other diagnostic images directly, remember to bring these to your appointment.

If you have dental insurance coverage, remember to bring the company name and your plan number with you to the office. We'll collect any deductible or percentage owing at the end of your appointment.

If you need to make any changes to your appointment time, please let us know at least 2 full business days in advance.

Feel free to call us at **(800) 555-1234** if you have any other concerns or questions before your appointment.

We look forward to seeing you!
Practice Name



Add to Calendar

Click to add this appointment to your calendar
[Click here](#)



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Always be sure to attach your logo and contact information.

Include the date, time, and duration of the patient's appointment.

Remind them to bring x-rays or other diagnostic images from their GP, if relevant.

Your patients need to know your cancellation policy - include it here!

Including the option to add their appointment to their calendar helps prevent missed appointments.

New patients need to know where they're going. Send a Google Maps link!

NEW PATIENT SAVE THE DATE - TEXT

Hi David! Welcome to Practice Name.

We've reserved a dental appointment for you on Thu, Sep 7 at 7:36am.

If you have any questions or need to reschedule, call us at (800) 555-1234.

If your dentist gave x-rays or diagnostic images to you, please remember to bring these to your appointment.

We'll see you then!

Keep it simple! Start with their name and include straightforward, simple information.

Include the date and time of the appointment.

Include contact information.

Remind them about x-rays or other diagnostic images.

NEW PATIENT FORMAL SAVE THE DATE - EMAIL



Your appointment is on:
Thursday, September 7 at 6:48am

Hello David,

Thank you for making a reservation with us at Practice Name. We look forward to providing you with an exceptional dental experience.

A consultation of this sort typically takes **40 minutes**.

If your dentist provided you with physical copies of x-rays, other diagnostic images, or a written referral, please make sure to bring them to your appointment.

If you have dental insurance coverage, remember to bring the name of your provider and your plan number with you to the office. We will collect any deductible or percentage owing at the end of your visit.

If you need to make any changes to your reserved time, please inform us at least 2 full business days in advance.

We will be happy to receive your call at **(800) 555-1234** if we can be of any assistance.

Sincerely,
Practice Name



Add to Calendar

Click to add this appointment to your calendar
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These templates have a very subtle tonal shift - but that subtle shift is essential if you want to use a more formal tone.

Like with the previous templates, be sure to include a reminder to bring dental insurance documents.

Whether you're using a formal or informal tone, be sure to include location information!

NEW PATIENT FORMAL SAVE THE DATE - TEXT

Hello David. Welcome to Practice Name.

We have reserved a time for you on Thu, Sep 7 at 7:37am.

If your dentist provided physical copies of x-rays, diagnostic images, or a referral letter, please bring them to your appointment. Remember to bring your insurance information with you if you have insurance.

If you have questions, we will be happy to receive your call at (800) 555-1234.

We look forward to your visit.

You don't have to sacrifice that subtle, more formal tone in a shorter communication method!

NEW PATIENT INSTRUCTIONS - EXAMPLE FOR EMAIL

New Patient Instructions

Please arrive with the new patient form completed. If you are unable to complete this form, please arrive 15 minutes prior to your appointment so that we can assist you.

If you require records or x-rays to be sent to us from your previous dentist, please complete the records transfer request form and send it to us at least a day before your appointment.

If you have dental insurance coverage, please provide us with your information prior to your visit.

 **New Patient Form**

 **Records Transfer Request**

You can include a section like this in your new patient email that will provide different options to your patient.

Offer digital forms that allow your patient to fill them out before they arrive at your practice, saving time at the appointment.

Instead of asking patients to bring along x-rays, offer a records transfer request.

Appointment Booked Templates

Confirm that your returning patient's appointment has been scheduled.

SAVE THE DATE - EMAIL



Your appointment is on:

Thursday, September 7 at 7:18am

Hi David,

Thanks for booking an appointment with Practice Name.

Your appointment is scheduled for:
Thursday, September 7, 2023 at 7:18am.

Want to add this appointment to your calendar? Simply click the Add to Calendar link below.

If you have any questions or need to reschedule, please call us at **(800) 555-1234**.

We look forward to seeing you again!

Best wishes,
Practice Name

 **Add to Calendar**
Click to add this appointment to your calendar
[Click here](#)

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For both new and returning patients, include your practice name and contact information.

Always include the date and time of the appointment.

Make it easy for your patients to add the appointment to their calendar.

And, make it easy for them to find you! Include a Google Maps link.

SAVE THE DATE - TEXT

Hi David!

Practice Name has reserved an appointment for you on Thu, Sep 7, 2023 at 7:19am.

See you then!

Keep your texts to your returning patients short and sweet.

FORMAL SAVE THE DATE - EMAIL



If you choose to use a more formal tone for your returning patients as well, you can make subtle changes to the texts you include to align that.

Your appointment is on:
Thursday, September 7 at 7:24am

Hello David,

Thank you for making a reservation with Practice Name.

We look forward to seeing you on
Thursday, September 7, 2023 at 7:24am.

To add this reservation to your calendar, simply click the *Add to Calendar* link below.

We will be happy to receive your call at **(800) 555-1234** if you have any questions or need to reschedule.

Sincerely,
Practice Name



Add to Calendar

Click to add this appointment to your calendar
[Click here](#)



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FORMAL SAVE THE DATE - TEXT

Hello David.

**Practice Name has reserved a
time for you on Thu, Sep 7, 2023
at 7:24am.**

We look forward to your visit.

For more formal text messages,
maintain a straightforward, crisp
style with basic information.

Reminder Templates

These templates can be used to remind your patient about their upcoming appointment.

EARLY REMINDER - EMAIL



Include your logo and contact information at the top of the email.

Your appointment is on:
Thursday, September 7 at 6:54am

Hi David,

This is a friendly reminder of your appointment on Thursday, September 7 at 6:54am.

If you need to reschedule, please call us at **(800) 555-1234** as soon as possible to avoid any short notice rescheduling fees.

We're also happy to hear from you if you have any questions regarding your appointment.

If you'd like to add this appointment to your calendar, simply click the **Add to Calendar** link below.

Have a great day!
Practice Name

Give them options to reschedule their appointment, if needed.

**This is an automated email; there's no need to reply at this time.
We'll contact you again closer to the appointment date to confirm.*

Let them know that this isn't the only time you'll remind them.

 **Add to Calendar**
Click to add this appointment to your calendar
[Click here](#)

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Continue to include the option to add the appointment to their calendar.

Give them a direct link to Google Maps with your practice's location.

EARLY REMINDER - TEXT

Hi David!

This is an early reminder that you have an appointment coming up on Thu, Sep 7 at 6:55am with Practice Name.

We'll contact you again closer to that time to confirm, but if you need to make any changes, please call us today at (800) 555-1234.

Thanks!

Always let them know that this will not be their only reminder.

FORMAL EARLY REMINDER - EMAIL



Your appointment is on:
Thursday, September 7 at 6:56am

Hello David,

This is a courtesy reminder for your reservation with our office on Thursday, September 7 at 6:56am.

If you know of any conflicts in your schedule and need to change your reservation time, please contact us at **(800) 555-1234** as soon as possible to avoid any short notice rescheduling fees.

We will also be happy to receive your call if you have any questions about your visit.

Sincerely,
Practice Name

**This is an automated email; there is no need to reply at this time.
We will contact you again closer to the date of your visit to confirm.*

 **Add to Calendar**
Click to add this appointment to your calendar
[Click here](#)

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If you choose a more formal tone, swap out 'a friendly reminder' for 'a courtesy reminder'.

Always let them know that this won't be their only reminder.

Include an option to add to their calendar and a Google Maps link with your practice's location.

FORMAL EARLY REMINDER - TEXT

Hello David!

This is a courtesy reminder of your upcoming appointment with Practice Name on Thu, Sep 7 at 7:08am.

We will contact you again closer to that date to confirm, but if you are aware of a conflict in your schedule, please call our office at (800) 555-1234 at your earliest convenience.

Thank you.

Keep it short and sweet, with the basic information, without sacrificing your formal tone.

MORNING OF - EMAIL



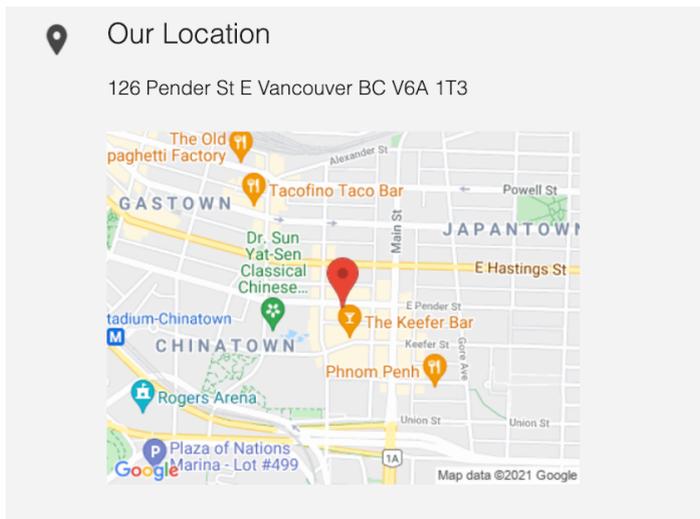
Your appointment is on:
Thursday, September 7 at 7:51am

Hi David,

We're looking forward to seeing you today for your appointment with Practice Name at 7:51am.

If you'd like directions to the office, simply click the map below. If you have any questions, feel free to call us at **(800) 555-1234**.

Best wishes,
Practice Name



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- It's time for your patient to come to the practice! Let them know what time you expect to see them.
- Include how to get in touch if they need to.
- Make sure to send a Google Maps link with your address.

FORMAL MORNING OF - EMAIL



Your appointment is on:
Thursday, September 7 at 8:03am

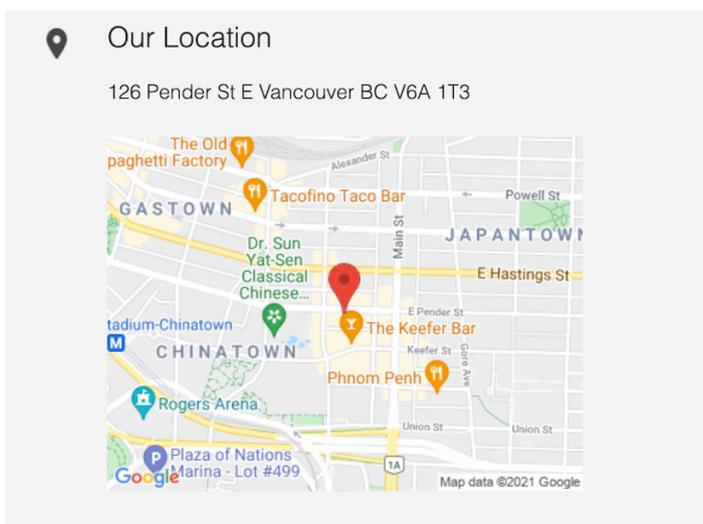
Hello David,

This is a courtesy reminder for your reservation today at 8:03am. If you would like to plan your route to the office, simply click the map below.

We look forward to your visit.

Sincerely,
Practice Name

Stick to the basics! Include the date, time, and an option to plan their route.



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2 HOURS BEFORE - TEXT

Hi David!

We're looking forward to seeing you today for your appointment with Practice Name at 7:52am.

We'll talk to you soon.

With the appointment only 2 hours away, stick to what matters: their name, your name, and their appointment time.

FORMAL 2 HOURS BEFORE - TEXT

Hello David.

This is a courtesy reminder for your appointment with Practice Name today at 7:52am.

We look forward to your visit.

Switch up your punctuation and your sign-off for a formal tone, while keeping the information pertinent to your patient.

Appointment Confirmation Templates

It's always best practice to get your patients to confirm their appointments. In this section, you'll find a mix of emails and text message templates for confirmations.

CONFIRMATION - EMAIL



Your appointment is on:

Thursday, September 7 at 7:42am

 **Click Here To Confirm Appointment**

Hi David,

We're writing to confirm your appointment on Thursday, September 7 at 7:42am.

Please click the green button above to let us know you've received this reminder.

Feel free to call us at **(800) 555-1234** if you have any questions.

We kindly ask that you let us know at least 2 full business days before this appointment if you need to make any changes.

Best wishes,
Practice Name



Add to Calendar

Click to add this appointment to your calendar
[Click here](#)



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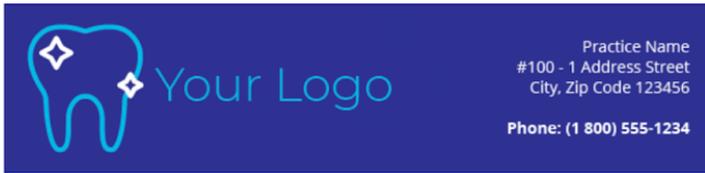
One of the most important parts of this message is to make it obvious to your patient how they can confirm! Include a prominent, labeled button.

Include your cancellation policy.

Patients can add the appointment to their calendar.

As always, link them to your address via Google Maps.

FORMAL CONFIRMATION - EMAIL



Your appointment is on:
Thursday, September 7 at 7:45am

 **Click Here To Confirm Appointment**

Hello David,

We are writing to confirm your appointment for Thursday, September 7 at 7:45am.

Please click the green button above to let us know you have received this reminder.

If you have any questions, we will be happy to receive your call at **(800) 555-1234**.

We kindly ask that you inform us at least 2 full business days before your visit if you need to change your reserved time.

Sincerely,
Practice Name

 **Add to Calendar**
Click to add this appointment to your calendar
[Click here](#)

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Include your office logo and your practice's contact information.

Include a prominent, labeled button.

Remind them of the cancellation policy.

Give the option of adding their appointment to their calendar.

Include your location via a Google Maps link.

CONFIRMATION - TEXT

Hi David!

**Please text back "C" to confirm
your appointment on Thu, Sep 7
at 7:43am with Practice Name.**

Keep it simple! Give clear instructions for how to confirm, when their appointment is, and include your practice name.

Post Appointment Follow-Up Templates

Gathering feedback about appointments is an important part of showing your patients that you care about their experience. Plus, prompt your happiest patients to leave a review!

POST-APPOINTMENT INSTRUCTIONS - EMAIL



Your appointment is on:
Thursday, September 7 at 8:36am

Instructions for after your appointment

Please read the following instructions prior to your appointment.

If you have any questions about them, feel free to ask us when you check in.

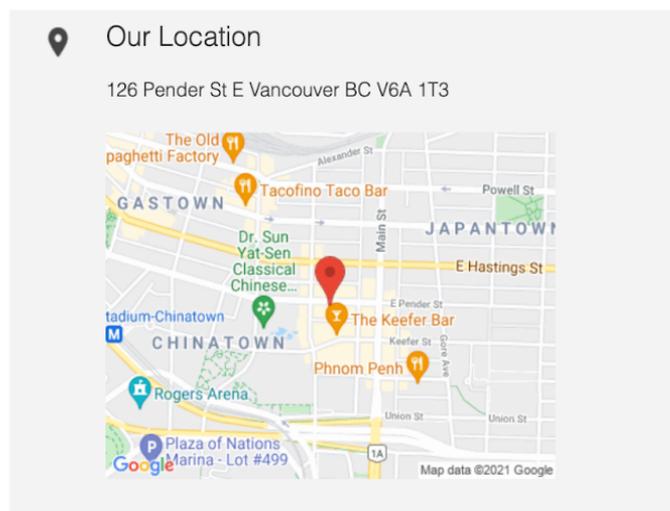
 **Post-Op Instructions**

Hi David,

We're looking forward to seeing you today for your appointment with Practice Name at 8:36am.

If you'd like directions to the office, simply click the map below. If you have any questions, feel free to call us at **(800) 555-1234**.

Best wishes,
Practice Name



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If sending these before the appointment, be sure to include the appointment date and time.

Include a link to their post-appointment instructions.

POST-OP INSTRUCTIONS - TEXT

****Instructions for after your appointment****

Please read the following instructions prior to your appointment.

If you have any questions about them, feel free to ask us when you check in.

**Post-Op Instructions:
<https://c1.intv.io/v2/ljsi327wkl>**

Remind them to read their instructions prior to their appointment.

Include a link to the post-operation or post-procedure instructions.

GENERAL CONSULTATION SURVEY - EMAIL

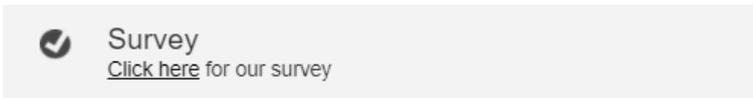


Hello David,

In order to continue providing the kind of care that keeps our patients smiling, we ask for your private feedback about the care you received in your most recent visit. This survey typically takes less than 3 minutes to complete.

We appreciate your honest feedback.

Your company name



Include the purpose and length of the survey.

Automatically gather feedback from patients about their recent visit.

GENERAL CONSULTATION SURVEY - TEXT

Hi David. This is Practice Name.

**So we can continue providing the kind of care that keeps our patients smiling, we'd like your private feedback about the care you received during your visit:
<https://c1.intv.io/v2/mj3ms62jld>**

**This survey typically takes less than 3 minutes to complete.
Thanks for your honest feedback!**

Automatically gather feedback from patients about their recent visit.

Include the purpose and length of the survey.

GENERAL CONSULTATION SATISFACTION SURVEY QUESTIONS



Practice Name
#100 - 1 Address Street
City, Zip Code 123456

Phone: (1 800) 555-1234

✓

Patient Survey

Please complete this survey to ensure that we are moving in the right direction to meet your needs.

1. Please indicate how strongly you agree or disagree with each statement:

	Strongly Agree	Agree	Somewhat Agree	Disagree
It was easy to schedule my appointment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I had a good experience with the front desk staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My appointment started on time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The clinical staff was knowledgeable and explained things well.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The doctor was compassionate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The doctor explained the procedure clearly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall, I am satisfied with recent appointment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

SUBMIT SURVEY

FEEDBACK REQUEST - POSITIVE

Thank you for visiting Practice Name today. We wanted to check in about your experience.

Did you receive the best care possible?
(Please reply with Yes or No.)

This is a simple check-in about their experience, that requires only a yes or no response.

Yes

We love to hear that! It would be a big help to us if you could let others know about your experience as well.

If you could click the link below to leave a brief comment, we'd appreciate it!

<https://c1.intv.io/v2/m1oxefau05>

Take this opportunity to ask them for a positive review!

FEEDBACK REQUEST - NEGATIVE

Thank you for visiting Practice Name today. We wanted to check in about your experience.

Did you receive the best care possible?
(Please reply with Yes or No.)

No

We are very sorry that you had anything other than a great experience.

Someone from our office will contact you to discuss how things went.

This is your opportunity to explain how you will follow up.

Recall Templates

These templates are for the final stage of the patient journey - where you begin the cycle all over again and recall them for their next appointment.

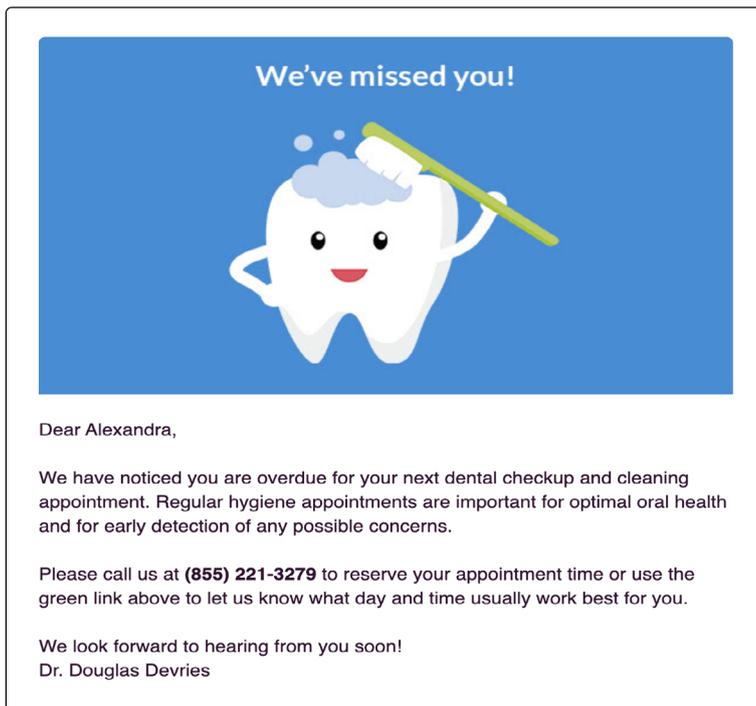
DENTAL CHECKUP AND CLEANING REMINDER - EMAIL EXAMPLE 1



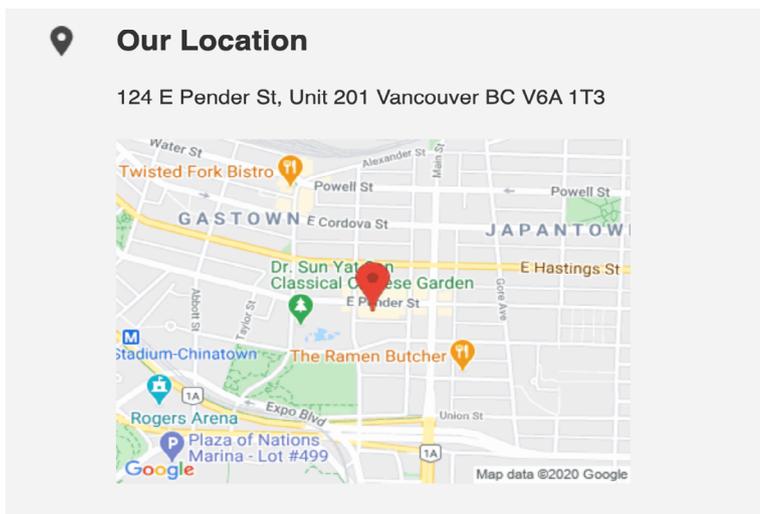
Attach your office logo and contact information.

 [Request an appointment now](#)

Include a prominent button for patients to click and request their appointment.



Include a fun graphic to grab patients attention.



Remember to include a link to your address via Google Maps.

DENTAL CHECKUP AND CLEANING REMINDER - EMAIL EXAMPLE 2



Attach your office logo and contact information.

 **Request an appointment now**

Include prominent button for patients to click and confirm their appointment.

Hi, Chayam,

We miss you!

We hope you're doing well. We just wanted to check in since it's been a while since your last dental checkup and cleaning. If you'd like to book an appointment, feel free to call us at (855) 221-3279 or use the green link above to let us know what day and time usually work best.

Remind patients of what appointment type they are overdue for.

If you've moved on to another dental office, not a problem at all. If you send us a quick reply to this message, we'll inactivate your file for you so you won't be contacted again.

If there's anything else we can help with, or if you have any questions about your file, we're always happy to hear from you at (855) 221-3279.

Best wishes,
Dr. Douglas Devries

Remember to include a link to your address via Google Maps.

