New Inquiry Questionnaire

*Utilize this form for a family/resident first calling in to inquire around additional information around the community*

**Introduction/Opening**

* Thank you for calling (community) how can I help you?
* I would be happy to get this information for you, may I ask you a few quick questions to understand how we can help you or your family?
* What was your name?
* In case we get cut off, may I have your number?
* Are you calling for yourself or for a loved one?
	+ If looking for a loved one, what is their name?

**Primary Contact:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Phone #**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Email:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Relationship to Resident:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Resident Name:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

NOTES:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Closing/Setting Next Steps**

**Based on everything that you have shared, I believe that the best next step is to:**

* Schedule a visit and tour of the community (is today or tomorrow better? Morning or afternoon?)
* Schedule a date to join us for lunch
* Have our team visit with your \_\_\_\_\_ at the skilled nursing center
* Plan to visit your \_\_\_\_\_ at home where they are most comfortable

**TOUR DATE:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **TOUR TIME:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Before we hang up, I want to be sure that I have your contact information so we can stay in touch. What is your email address? What is your preferred method of communication (phone, text, email)?

Is there a certain time that works best for you to receive phone calls?

Again, thank you so much for your time and interest!

IF NO TOUR SCHEDULED: *“We can give you a call in a few days after you have had time to digest this information and see if you have any questions.”*