

BASIC PHONE ANSWERING *Etiquette*

01



Answer calls with a smile and your full attention.

02



Determine **WHAT** the patient needs and **WHEN**.

03



Offer solutions for scheduling obstacles.

04



Schedule appropriately to meet callers' needs.

05



Gather needed info quickly, and set clear expectations.

A FEW TIPS FOR SCHEDULING APPOINTMENTS:

Practice
CAFE



ACTIVELY ENGAGE WITH PATIENTS

Keep multi-tasking and hold times to a minimum. Convey genuine concern for patients and their needs. Maintain control of calls—be deliberate, clear, concise, and proactive in addition to being compassionate. Lead the conversation; don't leave patients guessing what's next.



MEET THE NEED

Be prepared to offer solutions for common scheduling barriers. Have sufficient information and details readily available at the front desk. Set the right tone for the patient relationship that's just beginning!



SUMMARIZE

Briefly recap at the end of the call to make sure that you and your patient are on the same page. Clearly reiterate the next step(s). Set expectations that you can meet or exceed.

Whenever possible, set your team up to be successful in caring for this patient!

GUIDELINES FOR EXCELLENT CUSTOMER SERVICE:

From appointment scheduling to check out, make your patients feel valued and well cared for!

WHEN SCHEDULING:

- Engage fully and professionally with callers
- Meet needs quickly and with compassion
- Timely collect contact information
- Obtain and verify insurance information
- Inform ahead of time about paperwork
- Recap calls and reiterate expectations
- Track marketing-related details

APPOINTMENT FLOW:

- Greet and check in patient
- Confirm paperwork and verify insurance, if applicable
- Explain appointment flow
- Update chart and alert team that patient is ready
- Build rapport while patient is waiting
- Consult on insurance coverage and financial options
- At checkout, ask for a review and provide a referral card

For marketing purposes, apply the tips here AND have a system in place for call tracking and reporting. Without tracking and some form of data reporting, you market blind and can't really know what's working and what needs to be changed, both with your marketing and your team's performance. Be wary of any company that listens to or otherwise analyzes your call recordings without allowing access to the raw data. Such policies are a red flag for data filtering or manipulation. To ensure accountability of your marketing partner and your phone staff (in-house or at a call center), you should always have access to check your recorded calls anytime. Good information is important for good decisions!