**Telephone Scripts**



Telephone communication is one of the most important qualities a C.A. can possibly have. Why? Because most prospective patients speak to the C.A. on the phone long before they ever meet the doctor in person. That first impression with your office often sets the tone for the first visit with the doctor. It is of utmost importance that you, as a C.A., have complete command of phone technique and etiquette and all that can happen during these conversations.

**Objective of the phone call: Make the appointment!**

**Qualities**: Communicate the attitude of your office

1. Friendliness, helpful, pleasant voice, understanding, patient.
2. Talk to the person, not the phone
3. Assume the person you are talking to is your boss (because they are!)
4. Courtesy: Be interested in who you are talking with. Be in PTC.
5. Trustworthiness: Have a caring attitude. Give them the impression that you are reliable and dependable
6. Information: KNOW YOUR JOB
7. Service: Give your patients the best service possible.
8. Be certain about what you do and be sincere.

**Standard answers to questions:**

1. Location
2. Hours
3. Fees
4. Dr. Questions
5. Handling questions you don’t know the answer to.

**Three types of patients:**

1. New Patient
2. Existing Patient
3. Reactivating Patient

**New Patient Calls:**

If the caller has never been to your office before and wants to make an appointment, complete the following steps:

1. Use the **Today’s New Patient form** to get all of the necessary information. Let them know that you have openings today. Use the either/or method. “Would morning or afternoon be better? 9:00 or 11:00?”
2. Always try to schedule when you have other patients coming in. Contrary to what you might believe, people like to see a busy office. Usually there are a few extra forms for the new patient to fill out while the doctor is seeing existing patients, so you will have time to handle everyone.
3. After the time and date is settled, be sure to ask them to spell their name and repeat the phone number back to them.
4. **“If you have insurance, please bring your insurance card with you.”** This statement will elicit three different answers.
   1. “OK”
   2. “I’m not sure my insurance covers chiropractic.” **“If you will give me the information, I will be happy to check it for you and let you know when you get here.”**
   3. “I don’t have insurance.” **“We have a great self-pay program available which includes any necessary procedures at ½ price. On the average our fees for the first visit run approximately $\_\_\_ to $\_\_\_, depending on what the doctor needs to evaluate your case. You can pay that when you come in by cash, check or credit card, whichever works best for you.”**
5. With the time and money situation handled, follow up with**, “Do you know how to get to our office?”** Use landmarks, such as large intersections, popular buildings, etc. to make it easy for the patient.
6. Personalize the call by saying, **“When you arrive, Mrs. Smith, ask for Jennifer. That’s me. I want to take care of you personally.**
7. Ask them to please call if they cannot make the appointment.
8. Repeat the time and day once more and thank them for calling.

**Cancellations**

IMPORTANT: It is imperative that you train the patient from the beginning of their care that if they must miss an appointment, to please call you. “Mary, if you find that you cannot make your scheduled visit, please call to reschedule so that I won’t interrupt your day by calling.”

1. If the patient calls to cancel, begin trying to get them in the same day at a different time. If that is not possible, reschedule for the next working day. It is important that you help keep the patient on their care plan schedule. The better you train patients in the beginning of their care, the easier your job will be. It is your job to help keep the patient on their recommended care plan schedule and to teach them to be responsible for their appointments.
2. Note: We are not babysitters, and do not call to confirm each and every appointment (exception: the Doctors Report/NP Health Talk). If your software allows for text messaging and/or email appointment reminders, ask the patient if they would like to receive text or email reminders (you must get permission from the patient) and enter their information into your system.
3. Consistent cancelling by the patient should be communicated to the doctor, so that they can address the problem with the patient.

**Rescheduling**

When you must call because a patient hasn’t shown up or called, follow this procedure:

1. **Patient answers:** “Hi Mrs. Jones, you missed your appointment today. Is everything alright?” After taking care of any problems, reschedule.
2. **Voicemail:** Use the above message and add the following: “Since I can’t talk with you personally, I will schedule you for this Friday at the same time. If there is a problem with this, please call me at the office at \_\_\_-\_\_\_-\_\_\_\_. We’ll see you Friday at 4 pm. Thank you!”
3. **No answer:** If you have called several times that day and no answer, the patients name is placed on a call list for the next working day to be called and rescheduled. Keeping this list should prevent patients from falling into the “black hole” of lost patients.

**Refer to Benchmark 10 for the Recall/Reactivate System**