


# Telephone Procedures

## Telephone Etiquette



-  **Policy** To ensure that all calls are handled professionally, efficiently, appropriately and courteously. To convey image of a friendly and knowledgeable staff upon patient's first encounter with the office.

### Scope

All calls are to be answered by the **third** ring. The Receptionist has primary responsibility for answering the phone.

Identify additional staff responsible for coverage when designated person is away from desk or when office is exceptionally busy.

Establish and document how physician wants phone to be answered:

-  Dr. \_\_\_\_\_'s office. This is \_\_\_\_\_. How may I help you?
-  Dr. \_\_\_\_\_'s office. This is \_\_\_\_\_. How may I direct your call?

Determine if the caller is a new or established patient.




Obtain clear information regarding patient needs.

Always establish the reason for the phone call as quickly as possible.

Emergencies need to be routed and dealt with quickly.

ALWAYS ask the caller if it would be acceptable to put them on hold and WAIT for the answer. Do not assume that it will be acceptable. This may be an emergency call – establish reason for the call before placing caller on hold.

Direct the call to appropriate staff or area. Make every attempt to direct caller appropriately on the first attempt. Triage of calls as follows:

-  The **Doctor** accepts calls from other physicians and any emergencies (patient chart should be made available if concerning patient care).
-  The **Nurse** will accept calls if not actively involved in other patient care (caller's patient chart should be made available).
-  The **Administrative Staff** will accept calls if available.

Be courteous and treat all callers with respect. Answer the phones with a smile and treat any caller as you would wish to be treated.

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Focus your mind on what the patient is saying. Practice shutting out distractions. Listen for ideas not just words - thereby getting the whole picture, not just isolated bits and pieces.

Limit your own talking. You cannot talk and listen at the same time.

Keep remarks and questions prepared in advance by the phone to free your mind for listening to the caller.


Use reflective phrases. When you want a patient to elaborate on a point, pursue the thought by using a reflective phrase, such as “you said,” “you mentioned,” or “you described.” After repeating the statement, follow through with a question beginning with who, what, when, where, why or how.

Ask questions if you are not sure you understand everything the patient says or ask him to repeat.

Take notes to help remember points being said.

Avoid making assumptions about what the patient is going to say.

## Telephone Messages

 **Policy** To take accurate telephone messages and route them to appropriate personnel promptly. To ensure that all patient and business calls are returned promptly to ensure quality delivery of our services and to ensure a smooth operation of our business.




### Scope

All messages are to be taken on duplicate-copy phone message pads so that a copy of each message exists in the event of disputes or confusion.

Inform the caller that the person they wish to speak with is unavailable.

If the caller is a patient, determine if the call is urgent.

Ask the caller for the following information:

-  Complete name and correct spelling
-  Business name (if a business call)
-  Telephone number with area code if applicable and any extension


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Note the information on the message form, along with date and time of call. Ask caller if there is a message. Also note action needed (call back, will call again, etc.).

Let the caller know that you will pass on the message as soon as possible. If the call is for medical personnel during clinic hours, let them know the approximate time the call will be returned, attach the message to the patient's chart (if applicable) and place at the Nurses' station.

Thank the caller for calling.


## Facsimile & E-Mail Messages

 **Policy** To route facsimile and e-mail messages and reports to appropriate personnel promptly.

### Scope

The designated person(s) should ensure that the appropriate personnel receive facsimiles and any e-mail as soon as possible.


## After-Hours Calls

 **Policy** To determine how to handle after hours calls to facilitate delivery of care to our patients at all times to provide 24-hour coverage so that patient has access to a physician.

### Scope

Each practice will determine how to handle after-hours calls.

## Long-Distance Telephone Calls


 **Policy** To ensure that long distance services are not used for personal calls and the use of services is monitored in each office.

### Scope

Long distance calls for personal matters are not allowed under any circumstances.

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## Pharmacy Calls

 **Policy** To adequately meet the needs of patients, physicians, and local pharmacy staff in promptly filling prescriptions.

### Scope

### Refills

When a caller requests an Rx refill, the following information should be documented on duplicate-copy prescription message pad:

-  Patient Name
-  Name of prescription drug; dosage; strength of drug
-  Prescription Number
-  Pharmacy Name and Phone Number
-  Any medical allergies
-  Explain the refills are called to pharmacies at the end of the workday
-  Ask for number where patient can be reached at the end of the day if needed

Pull patient's medical history record, attach request to outside of chart.

Please chart and request an established place for pick-up by medical assistant, so the request can be reviewed with physician.

Document refill in patient medical record on flow sheet.

Call pharmacy with prescription information at end of each day.

Call patient to inform them if changes were ordered or any additional instructions were given by physician.

Prescription refill calls will be tracked for one month. A determination will be made if a Pharmacy line needs to be added to phone lines.

### New Rx

No new prescriptions are given over the telephone. An office visit is required.

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## Patient Relations Skill Quiz

- ☎ A caller asks for the doctor's qualifications. What would you say?
- ☎ A new patient asks how much the first visit costs. What would you say?
- ☎ How would you handle an insurance company representative who wants to know about a patient's medical history?
- ☎ What would you say to a new patient who says a patient referred him or her?
- ☎ Another doctor asks to speak with the doctor. What would you say?
- ☎ The doctor asks you to get someone on the phone. What would you do? What will he need?
- ☎ How would you explain what happened at the initial appointment?
- ☎ A new patient asks some questions you can't answer regarding a new treatment. What would you do?
- ☎ An area employer wants your opinion of a former employee of the practice as a job reference. What would you say?
- ☎ An attorney calls to ask you about a particular patient. What would you say?
- ☎ One of the employees calls you to say he or she is sick and is not coming in to work that day. What would you do?
- ☎ A charitable organization calls to see if the practice can contribute. What would you say?
- ☎ A patient calls to cancel an appointment at the last minute. What would you say?
- ☎ A patient says the last billing statement is incorrect. What would you say?
- ☎ Someone you're calling wants to put you on hold for the second time. What would you do?
- ☎ A caller tells you he couldn't get through because the line was busy for a long time. What would you do?
- ☎ A minister wants to know whether he/she will receive discounted services or free services. What would you do?

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- ☎ A patient wants to apply for a job with us. What would you say?
- ☎ A caller asks about our practice because he or she is “shopping” for a new doctor but is not ready to make an appointment. What would you do?
- ☎ A doctor’s spouse or child says he or she must speak to the doctor. What would you say?
- ☎ A patient asks to speak with the doctor. What would you say?
- ☎ A patient calls a half hour before an appointment to say his car won’t start. What would you do?
- ☎ A community group asks if the doctor can give a talk on Tuesday. What would you do?
- ☎ A patient asks you to forward his or her records to another doctor. What would you do?
- ☎ The TV crew shows up during office hours. What would you do?

## Documentation

📖 **Policy**                      To document all telephone calls relating to patient care.

### Scope

Any telephone contact with a patient, the immediate family, or another health care professional concerning a clinical issue will be recorded on the “Patient Contact Form”. A sample of this form is included in this section.

The Patient Contact Form is not used for contact with the patient during an office encounter.

### Patient Contact Form

Patient Name: \_\_\_\_\_ Doctor: \_\_\_\_\_

Date	Time	Detail of Contact	Signature
	a.m./p.m.		