Customer Service for the Medical Office

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You Are the Front Line of Defense. . .

"You never get a second chance to make a first impression"

Question:

- Who takes the heat when a patient is upset about their bill, is made to wait 10 minutes past their appointment time, or shows up 90 minutes early and gets the “evil eye” until they are taken into a treatment room?

Answer: NOT THE DOCTOR!

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The Phone

The First Critical Step in the Entire Patient Experience

- In the initial call, patients make many decisions about your practice
  - *Ultimately, you are the deciding factor in the patient experience within your practice*
- The phone can make or break a practice

Phone Skills

- Always smile – the person on the other end of the phone can hear it!
- *Never chew (eat) while on the phone!*
- Speak slowly and clearly
- Use the tone of your voice to feel inviting (inflection)
- Do not put patients on hold repeatedly
    - *Take phone number and <u>call them back</u>*

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Appropriate Verbiage on the Phone

- "May I please put you on hold"
  - *Wait for a response*
- We have availability today at 3:30pm or tomorrow at 9:00am.
  - *Do not leave "appointment time request" open ended*

Double check the patient's phone number

Collect the BEST number to reach them and obtain **email addresses…..**

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How to Obtain the Patient's Email?

- Create a parameter on the intake form to collect patient email addresses
- When asking, make sure to say:

  "Please provide me with your email address so we can send you the necessary paperwork for you to complete prior to your visit"
- It's about convenience and efficiency

New Patient Email Example

Thank you for calling our office to make an appointment scheduled on Wednesday, September, xxth, x:00 pm. We take pride in providing first class foot and ankle care for over XX years in a friendly, warm environment with doctors and staff who are sensitive to your medical needs. For your convenience, we are sending you this e-mail providing useful information prior to your visit to our office. ***In an effort to give you a timely and thorough response, please call our office at **(xxx) xxx-xxxx** with any questions you may have concerning this email.

- To download our new patient forms packet you can complete in the convenience of your own home, please click HERE

OR

To download the forms individually, please click on the links below:

- New Patient Registration Form
- HIPPA Notice of Privacy
- Financial Policy
- Our Patients Bill of Rights
- Office Policies Regarding Your Insurance
- Podiatric Pain Analysis Survey (PAS)
- Vascular Questionare

--- For directions to our office click HERE ---

Please remember to bring your insurance card and a paper referral if needed. You can learn about our practice at www.fyourpracticehere.com and please feel free to call us at (xxx) xxx-xxxx at anytime with questions.

Our office mission statement says it all…..

"We at BEST PODIATRY CARE EVER are pledged to improve quality of life through treatment of foot and ankle disorders. Our team is committed to a relationship based upon care, concern and compassion. We will always strive to enjoy what we do."

Professionally Yours,

Greatest doctor. DPM, AAPWCA
Amazing Surgeon, DPM FASPS

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Why Obtain the Patient's Email?

- Patient communication
  - *E-Newsletter*
  - *Practice Announcements*
  - *Marketing/Drip Campaigns*
  - *If you are unable to reach them via telephone (as a secondary means of communication)*
  - *NOT to send funny cat videos!*

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End All Calls with a Positive Closing Statement

- "Thank you Mr. Smith, we look forward to seeing you next Wednesday. Have a great afternoon!"
- Personalize if possible

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Appointment Reminders

- Always remind patients of their appointments
- This is a courtesy, but our patients need it!
- Automated systems work well and can text, call or email patients according to their preference
- Ask patients which phone number they would like you to use if reminding manually

2 Day Courtesy Rule

- For Plans that require referrals/ prior-authorization:

- *Call 2 days prior to patient visit, check for current referral with additional visits. If not present, contact patient*
  - *It is the patient's responsibility to obtain a referral (if their plan requires one) - let your patients know that if you are obtaining the referral for them, it is a courtesy.*

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Patient Arrival

- Make eye contact, and smile
- As they come closer, greet them
- Call by first name when possible
  - *For the elderly population (or when demographically appropriate), use Mr. & Mrs.*
- Explain "WHY" you are taking a photocopy of their ID (License) – identity protection

Patient Arrival Continued…

- Make sure reception area is clean
- Offer up to date magazines
- Television (with educational programming)
- Neat front office
- Matching front office uniforms
- Name tags

Patient Departure

- Make eye contact, and smile
- Use names when possible “Thank you for coming in today, Mrs. Jones.”
- Wish them a great morning/afternoon/evening

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Ideal Front Office Structure

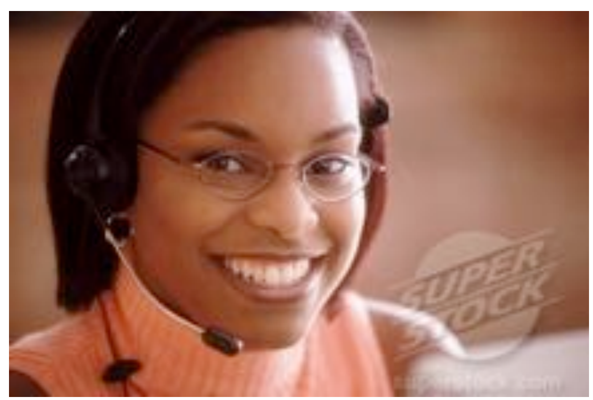
Check Out

Phone

Check In

Check In

- Greets Patients in a warm, friendly manner
- Information Collection and reviewed
- Answers phones AFTER patients are attended to.
- *The patient in front of you is always most important!*



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Important Information Collected

- Examples:
  - *Checks to make sure patient forms (all intake papers) are completed and signed*
  - *Without a signature (s), the doctor cannot treat*
  - *Photocopies/scan of insurance cards, med lists, etc.*
  - *Verifies that there have been no insurance changes, demographic updates, or PCP changed since last visit*

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Pay Close Attention

- Taking an extra few moments to double check an entry, can save hours later. . .
- Remember, "Crap in, Crap out!"

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Check Out

- If appointment not made in room, check out is responsible to make a follow up appointment and understand when the patient is to return
- Schedule appropriately according to other patients and what will take place during the visit **Establish scheduling rules with back office –

Example: No double booking of new patients or procedures**

- Handles payments and recording of In-Office Dispensing items

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Phones Position

- If there is a designated "phone receptionist" the priority should be:
  - To answer phones (by third ring)
  - Enter demographic information accurately
  - Always repeating back spelling of names and accuracy of phone numbers
  - To keep hold times to a minimum

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Other Suggestions

- Have a "Front Office Lead"
- "Switch Roles"
- Front office TEAM should meet 1x per week for 10 – 15 minutes
- Create a call center for incoming calls
- Have a "billing department" that should appear to be off site even if it's not)
- Eligibility and Benefits Coordinator/Team

Less Talk is More

- Avoid speaking about patients in common areas of the office.
- Respect the privacy of your patients
- If possible speak privately with the doctor about a "special" patient before the he/she enters the treatment room

- Always be aware of the level of your voice.

Document ALL Communication

- If a patient calls and expresses a concern, has a question, etc. DOCUMENT IT!!
- If a staff member speaks to a patient and is able to handle the situation without disturbing the doctor, it should be emailed to the doctor (via secure email) and copied back to the staff member.
- Scan the email into the patient's chart (communication folder).
- This makes for ease of location for the doctor and staff to reference at a later date.
- Electronic documentation is the best method to CYA!

Back Office

- Each member of a back office team also has responsibility and influence over the initial and continued impressions of your patients
- If they are unprepared, uninformed, or unfriendly, patients associate the doctors treatment style with these type of characteristics

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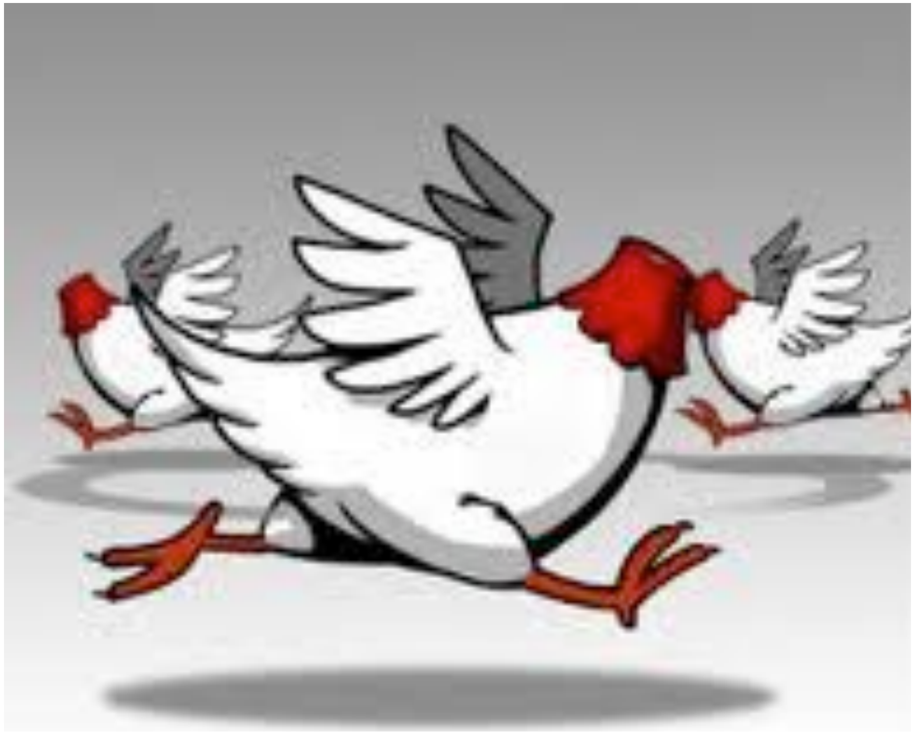
If Your Back Office Feels like. . Take Immediate Steps to Fix It!



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Anxious Patients Respond

- If a patient presents with a painful issue, needs a procedure, is generally anxious and suffering from “White Lab Coat Syndrome”, they will only feel at ease if they gather an impression of structure, control and competence amongst staff and doctors.

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The Back Office's Opportunity to Shine!

- Before seeing the doctor, the back office has the chance to prepare the patient for what will take place, calm their nerves, impress them with their knowledge and even smooth over any situation that has put them in a negative mood (insurance issues, balances owed, etc.)

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Back Office Lead

- The back office should have a lead who is responsible for a multitude of tasks from:
  - Ordering supplies and taking inventory
  - Coordinating schedule changes that affect patient hours and doctor coverage
  - Handling smaller issues that don't require the attention of the doctor or entire team
  - Run meetings with their fellow back office team members once weekly

Show Your Patients that You Are the BEST

- Working as a team to improve efficiency systems, keep patients flowing smoothly through the office, and always doing it with a smile allows your patients to have confidence that they have chosen the right facility for all of their foot and ankle needs.

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Schedule Regular TEAM Meetings

- When implementing any new system (non verbal, scheduling differently, etc.) ask for every TEAM member's input.
- No one likes change (especially when they don't have input)

- If staff/doctors work together to create communication systems, they are more likely to be used effectively.

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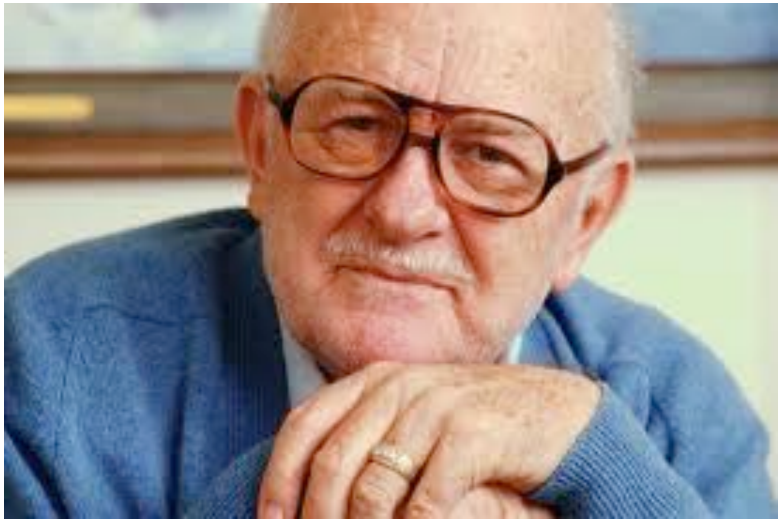
Some Issues Need to be Addressed Verbally

- Non verbal communication is an effective way to increase efficiency and productivity.
  - However, sometimes passive means of communication (texting for example) isn't sufficient or appropriate.
- Set up a formal meeting to discuss issues via email or by asking your manager/doctor in person during non-clinic hours

The Changing Healthcare World

- In this time of change and quantity over quality, patients appreciate the personal touches and increased efforts to make them feel special and realize that their time is valuable.



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Take a Few Moments Everyday

- To put aside your own “issues”
- To focus on providing the best possible patient experience
- To stop and think that “the customer/ patient is always right”- even if you know they are NOT!
- Make someone feel special (a patient or a team member)
- Smile with your heart

Thank You!!!

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"Success comes before work only in the dictionary."
- ***Anonymous***

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