Front Desk Etiquette, Scripting and Procedures

**Telephone/Front Desk Etiquette 101:**

* Smile, the caller can hear it through the phone
* Speak slowly and clearly
* Never chew food, gum or drink anything while on the phone
* Ask permission before placing a caller on hold
* Always thank patients for calling!
* All liquids should be in closed containers
* No food is allowed at the front desk
	+ All snacks/meals should be eaten in the break room

**Answering the Phone:**

Answer by the third ring with your name and a friendly greeting:

**“Thank you for calling \_\_\_\_\_\_ Foot and Ankle. This is \_\_\_\_\_\_**. **How may I help you?”**

**Scheduling Process and Scripting (Essential information to collect)*:***

1. Patient’s name (**ask them to spell it and repeat it back**)
2. Date of Birth (**repeat it back**)

*(determine from name and D.O.B. if the patient is new, existing or new-existing/not seen for 3 years or more; especially if they are unsure. This will avoid duplicate charts as well as errors on doctor’s notes.*

1. Best number to reach them/remind them of their appointment
2. Reason for and urgency of visit – LISTEN to the problem (this will determine how soon the patient should be seen) and record in the comment section
3. **Insurance information – including ID #** and if referrals or authorizations are needed

If we are not contracted with that insurance, let the patient know and give them the option to self-pay (relay cash pay Evaluation “starting” price; no surprise billing)

1. Primary Care Physician and Date Last Seen for “Medicare” patients (traditional and replacement plans)
2. Email address

**Script to complete NP appointment scheduling (following input of basic demographic and insurance information and reason for visit):**

* “Mr. Green, in order to keep wait times down and to limit contact with other patients and staff members, we ask that you participate in a 15-20 minute pre-visit interview with our New Patient Coordinator. These calls are scheduled between 12:00 p.m. – 2:00 p.m. Mondays, Tuesdays and Wednesdays. Which day works best for you and which number is best to reach you? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (response). Can the NPC leave a message or send a text to this number if he/she is not able to reach you? The Caller ID will display \_\_\_\_\_\_\_ Foot Care.

During the interview, your New Patient Coordinator will remind you to bring your insurance card(s) and photo ID to the appointment and will let you know how much will be collected prior to seeing the doctor based on your insurance benefit information. Our patients really appreciate the time we take to prepare for their visit and make sure there are no surprises. Thank you for calling. Have a great day!“

**New Patient Coordinator Script:**

“Hi \_\_\_\_\_\_\_ (patient preferred name; Mr. Ms./first name), this is \_\_\_\_\_ the Patient Coordinator from Dr. White's office. I will be asking you a series of questions regarding your medical, family, social, surgical and medication history. Please try to answer to the best of your ability. We appreciate you taking the time to speak with me as this will greatly expedite your upcoming visit. Let’s get started.”

* If you are training for this position, have the NPC use paper intake forms for the interview, recording and then later entering into the E H R (this is a great way for them to learn the system and order of questions for future interviews with direct input).

**Sample Scripts for following up with new patients and procedures:**

“Hi \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (patient’s name as they prefer to be called; Mr./Ms./first name), this is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ calling from Dr. \_\_\_\_\_\_\_ office (or practice name).

For New Patients: I’m calling to see how your visit went today and to make sure that all your questions were answered.

For post procedure patients: I’m calling to see how you are feeling and to make sure you didn’t have any questions for Dr. \_\_\_\_\_\_\_\_\_\_.

For either: Please don’t hesitate to call if you have any questions or concerns before your next appointment. If not, we look forward to seeing you on Day, Month at \_\_\_\_:\_\_\_\_ a.m./p.m.

Have a great day, night, weekend!