

HELP! THE PHONE IS RINGING!

Description:

This period of instruction entails basic communication skills and basic professionalism in an office setting. The performance of the tasks described is usually performed by the person or persons working the front desk. However, it may be necessary for any one in the office to answer the telephone during times of high activity.

Learning Objectives:

1. You will learn that the telephone can be a valuable tool for or a hindrance building the practice.
2. You will learn when, where, and how to answer the telephone.
3. You will learn the importance of answering the telephone properly and the impact you have on the efficiency and perception of the practice.

I. Introduction: We often overlook the importance of the staff that are answering or using the telephone. 5 Minutes

- A. Answering the telephone gives the first impression
- B. Sets the tone for the patient's visit
- C. Can be a decision maker on whether or not the patient comes to your practice
 1. based on your attitude
 2. based on the information you give them
 3. based on your professionalism

II. Answering the Telephone
10 Minutes

- A. Always answer the telephone by the second ring
- B. Always answer with a greeting; identify practice, then yourself, then ask how you may help them. Ex.: "Thank you for calling Advanced Eye Care Associates, this is Sharon. How may I help you?" or "Good morning/afternoon, Advanced Eye Care Associates, this is Sharon. How may I help you?"
- C. If more than one person is answering the telephone, be uniform in your greeting.
- D. Make sure the patient can hear the **SMILE** in your voice. Your goal is to make them look forward to coming to the practice.

III. Scheduling and Maintaining Appointments: You may be asking "What does making/maintaining appointment has to do with telephone skills?"
15 Minutes

- A. You control the patient flow and income for the practice

1. No appointments, no revenue; no revenue, no income; no income, no job
 2. Too many appointments you overlap and fall behind; patients get upset
- B. Obtain the proper information when making an appointment
1. What is the reason for making the appointment?
 2. What is your medical insurance?
 3. What is your vision insurance?
- C. Get the following information from each patient when making an appointment
1. Patient's full name
 2. Policy # (BC/BS needs alpha prefix)
 3. Patient's SSN
 4. Patient's date of birth
 5. Patient's Home phone, Work phone, and Cell Phone (Get a minimum of two phone #/s)
- D. If the patient is not the insured you will need the following:
1. Insured's full name
 2. Insured's SSN
 3. Insured's date of birth

All of the above should be gathered from the telephone before they even arrive at the practice. For consistency, use a check-list

IV. Keep the schedule booked full
15 Minutes

- A. All appointments should be confirmed the day before. Call the patient at home, work, or cell phone
- B. Cancellations and No-Shows are a fact of life
1. Constant challenge to keep schedule full or avoid over-booking
 2. Cancellations/No-Shows that are not filled are lost income
 3. Maintain a Cancellation/No-Show list
 - a) move them to the appropriate list
 - b) print the list daily
 - c) when you have a cancellation/no-show go to your list of priors and start calling to see if anyone can come in
 - d) Sample script: "Hello, Mrs. Smith. This is Sharon form Carter Eye Care Associates. I am calling because you had an appointment last week and you were not able to come and I know how important your eye care is to you. I had someone reschedule

today at 3:00 and you were the first person I thought of. Could you come by at 3:00 today?"

- e) If they can not come, you can usually reschedule them for another time.
- f) Call the cancellation list first and then the no-show list
- g) No guarantee you can fill all open slots, but this is a tool to help you handle last minute cancellations or no-shows.

V. Conclusion:

5 Minutes

As you can see, this is one of the most important jobs in the office. First impressions are lasting impressions; you only get one chance to make a first impression. Without good phone skills we would not have patients; no patients, no income; no income, no jobs!! The success of the practice starts with you!!!