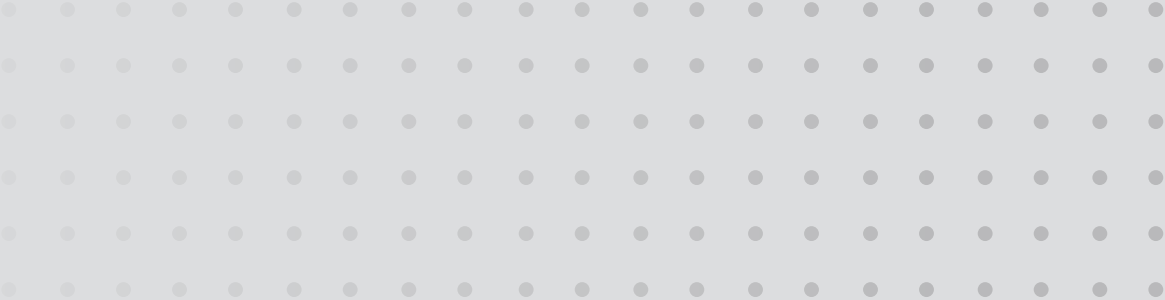


Telephone Scheduling Scripts

A Guide to Conversations



This scheduling tool provides a general idea of what to say in certain situations. The suggestions are designed to give your front desk (FD) staff confidence as they schedule patients in your clinic. Use comfortable language, so you sound natural to the caller, but be careful not to alter the intent of the message. The scripts are designed to work along with the KMC University New Patient Data Collection Form.





Telephone Scheduling Scripts

The Initial Phone Call

You have heard the statement, “new patients are the lifeline of a practice.” It is vital that your team does not drop the ball on the initial call. The first step in every call is to determine if the caller is a new or established patient. A simple question like “when was the last time you saw Dr. Smith ” can direct the data collection process for your team.

Front Desk: Thank you for calling Smith Wellness Clinic, this is Elizabeth, how may I help you?

Patient: *I would like to schedule an appointment to see the doctor.*

Front Desk: May I ask your name please?

Patient: *Yes, it is Mrs. Allen*

Front Desk: Hello, Mrs. Allen, when was the last time you saw Dr. Smith?

Patient: *I have never seen the doctor before.*

Front Desk: Whom may I thank for referring you?

Optional Responses

Patient: *My neighbor Mary Jones, she swears by Doctor Smith.*

Front Desk: We are honored when our patients care enough to send us their friends and neighbors; I will thank her personally when I see her.

Patient: *I was not referred; I just saw your sign.*

Front Desk: Well, I am glad you found us.

Patient: *You were on my insurance company’s approved list of chiropractors.*

Front Desk: Well, I am glad Dr. Smith was in your network.

Front Desk: What type of problem are you having?

Patient: *I have been having headaches.*

Front Desk: I am sorry to hear that. How long has this been going on?

Patient: *I have had them on and off for years, but they have been almost daily in the last month.*

(continue with the **Identifying the Needs** scripting)



Telephone Scheduling Scripts

Identifying the Needs

Once you have established that the caller is a new patient, you need to verify if the caller has had an injury or fall. This information will assist you in collecting data about the patient's insurance coverage (if applicable), as well as scheduling the appropriate time for their appointment. This script will pick up where we left off on the **initial phone call**.

Front Desk: Was there a fall, accident, or injury that brought on these symptoms?

(if yes, jump to **Personal Injury/WC Caller)**

Patient: *No, no falls or accidents. All good there.*

Front Desk: That is good to hear. And may I assume we will be filing this visit with your health insurance?

Patient: *Yes, I will be using my insurance.*

(offer two appointment times using your clinic's preferred scheduling method)

Front Desk: Great. We have an opening at 10:00 am and another at 4:30. Which would you prefer?

Patient: *I think 4:30 would be best.*

Front Desk: Do you know how to get to our office at First and Main?

(If the answer is no, give directions.)

Patient: *Yes, I do.*

Front Desk: Great, then you know we are right across from Fire Station #3 on Main Street. I would like to ask you a few questions that will save time when you are in the office...

(Follow the KMC University New Patient Data Collection Form.)

If you would like to save even more time during your visit, please go to our website **<give office website URL>**. On the home page, you can print our New Patient forms and review our Financial Policy. If that is not an option, I am happy to send them to you via email.

(Wait for the patient to reply, if uncomfortable with accessing electronic forms, provide alternative).

Please complete the forms and bring them with you on your first visit. If you have any questions or if you need help with the forms, please feel free to call back; I'm Elizabeth. Thank you again for calling and we look forward to seeing you on **< appointment date and time >**

NOTE: If a caller were to ask, 'how much does it cost to see the doctor?' we recommend that you offer a Good Faith Estimate per the No Surprises Act regulation. If a patient is self-pay, uninsured or choosing not to file with their health insurance a Good Faith Estimate is required. If the patient is uninsured or not utilizing insurance and request to know the cost, a clinic should provide a Good Faith Estimate within three business days. If they are making an appointment for that day, you can provide a verbal estimate and later provide one in writing. Be sure to role play different scenarios.



Telephone Scheduling Scripts

Personal Injury/ Workers' Comp Caller

Identifying an injury patient on the initial call can alleviate stress and frustration when the patient arrives in the clinic. The data collected will assist staff in setting up the injury case within the practice management software and start the ball rolling on verifying the claim information.

Front Desk: Was there a fall, accident, or injury that brought on these symptoms?

Patient: Yes.

Front Desk: Thank you for telling me you were injured. I am so sorry to hear this. What type of injury was it (car accident/at work/other)?

Patient: Car Accident.

Optional Responses

IF Personal Injury/ Auto Accident: Please bring your automobile insurance policy declarations page, the injury claim number, the name of the adjuster assigned to the claim, police report (if applicable), and any medical reports you may have from other providers.

IF Workers' Comp: Please bring a copy of First Report of Injury or similar document stating the date of injury, employer information, claim number, the adjuster name, adjuster contact information, and any third-party claim management company that is handling your injury claims.

IF Other: Please bring a copy of the injury claim, insurance information, and any reports from other providers.

(Offer two appointment times using your clinic's preferred scheduling method.)

Front Desk: We have an opening at 10:00 am and another at 4:30. Which would you prefer?

Patient: I think 10:00 am would be best.

Front Desk: Do you know how to get to our office at First and Main?

(If the answer is no, give directions.)

Patient: Yes, I do.

Front Desk: Great, then you know we are right across from Fire Station #3 on Main Street. I would like to ask you a few questions that will save time when you are in the office...

(Follow the KMC University New Patient Data Collection Form.)

If you would like to save even more time during your visit, please go to our website **<give office website URL>**. On the home page, you can print our New Patient forms and review our Financial Policy. If that is not an option, I am happy to send them to you via email.

(Wait for the patient to reply, if uncomfortable with accessing electronic forms, provide alternative.)

Please complete the forms and bring them with you on your first visit. If you have any questions or if you need help with the forms, please feel free to call back; I'm Elizabeth. Thank you again for calling and we look forward to seeing you on **< appointment date and time>**.



Telephone Scheduling Scripts

Established Patient

Just because the caller is an established patient does not mean we can skip the questions. From one day to another, many things can happen to a patient that would impact the type of appointment they need in the clinic. For example, they could have had an auto accident or work-related injury. Once they are in the clinic you will still need to confirm the demographics and insurance on every visit. It is possible they have moved or had a change of employment or worse, job loss. Never assume. Ask questions and/or confirm.

Front Desk: Thank you for calling Smith Wellness Clinic, this is Elizabeth, how may I help you?

Patient: *I would like to schedule an appointment to see the doctor.*

Front Desk: May I ask your name please?

Patient: *Yes, it is Mrs. Allen.*

Front Desk: Hello, Mrs. Allen, when was the last time you saw Dr. Smith?

Patient: *I saw Dr. Smith three months ago.*

Front Desk: Have you had any recent falls, accidents, or injuries?

Patient: *No.*

(if yes, jump to **Personal Injury/WC Caller)**

Front Desk: Will we be filing a claim with your insurance on this visit?

Patient: *No, I will not be using my insurance.*

Front Desk: Would you like a Good Faith Estimate of your out of pocket cost for the visit?

Patient: *No, that is not necessary.*

Front Desk: Okay. If you change your mind just let us know. Would you prefer a morning or afternoon appointment?

Patient: *I am not sure, depends on what you have?*

(Offer two appointment times using your clinic's preferred scheduling method.)

Front Desk: We have an opening at 11:00 am and another at 2:00 today, which would you prefer?

Patient: *I think 2:00 would be best.*

Front Desk: Okay, I have you scheduled for 2:00 today. Have you had any changes to your address or insurance?

Patient: *No, nothing has changed.*

Front Desk: Great! Thank you for calling Mrs. Allen. We look forward to seeing you this afternoon.