

BUILDING PHENOMINAL PHONE SKILLS

ANSWERING THE PHONE

Sometimes we don't recognize the importance of the staff that are answering the phone but you set the tone for the patient's visit and you are the first impression of the practice. Patients make a decision on whether to come to your practice based on your attitude and the information you give them on the phone. The information you give a patient is what they use to form their opinion of your practice and your doctors whether positive or negative. So it is very important that you present yourself in a professional manner.

1. Always answer the phone by the second ring.
2. When answering the telephone always answer with a greeting, identify your practice and then identify yourself to the patient, and ask how may you help them.

Examples:

“Thank you for calling Advanced Eye Care Associates, this is Sharon, how may I help you?”

“Good morning/Good Afternoon, Advanced Eye Care Associates, this is Sharon, how may I help you?”

3. If more than one person is answering the phone be uniform in the greeting that you use.
4. Make sure the patient can hear the smile in your voice! Your goal should be to make them look forward to coming back.

SCHEDULING AND MAINTAINING APPOINTMENTS

Through appointment scheduling you control the patient flow and income in the office. If the appointment schedule is not worked efficiently there will be either empty appointment times or overlapping appointments which result in running behind and patients getting upset and possibly leaving. Not having enough patients or patients waiting too long and leaving, both result in loss of revenue. It is also very important when scheduling appointments to obtain the proper information so you are able to get insurance verified before the patient arrives.

Questions to ask when making an appointment:

1. What is the reason for making this appointment?
2. What is your medical insurance?
3. What is your vision insurance?

You need the following information on each patient when making an appointment:

1. Patient's full name
2. Policy # (BC/BS need alpha prefix)
3. Patient's Social Security Number
4. Patient's Date of Birth
5. Patient's Home Phone, Work Phone & Cell Phone (Get a minimum of two phone #'s)

If the patient is not the insured you will need the following

1. Insured's full name
2. Insured's Social Security Number
3. Insured's Date of Birth

Make sure the schedule stays booked full. All appointments should be confirmed the day before. Call the patient at home or at work if possible. Cancellations and No-Shows are a fact of life. It is a constant challenge to keep the schedule full without over-booking and running behind. Cancellations and No-Shows that go unfilled are lost income from exams and potential optical sales. One way to have a ready source of fill-in's is to maintain a Cancellation list and a No-Show list. If your schedule is on a computer try to add a column called Cancellations and another column called No-Shows. When a patient does not show up or cancels, you can move them to the appropriate column. Print out this list each day and keep it in a notebook. When you have a cancellation or no-show, go to your list and start calling the prior cancellations or no-shows to see if they could come at the open appointment time. A possible script for calling a cancellation for an appointment is as follows:

“Hello, Mrs. Smith. This is Sharon from Advanced 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 today at 3:00?”

If they cannot come for that appointment, you can usually re-schedule them for a future time. You should call the cancellation list first and then the no-show list. This will not insure that you will fill all empty appointments, but it is a tool to help you handle last minute cancellations or no-shows.

CONCLUSION

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