

Telephone Considerations

Overview

Telephone contact plays an important role in health care, and the efficiency of a telephone contact will shape a patient's impression of your practice. If you have not evaluated your phone system and procedures recently, it may be time to assess how your practice is managing incoming and outgoing calls. Efficient and courteous call management may save your practice time and money and should benefit your patients as well. It is important to consider health literacy when assessing your telephone communications.

Purpose

To help practices manage their telephone system and develop staff procedures for telephone contact.

Testimonial


“When our practice staff tried to answer all phone calls, many patients complained about getting a busy signal. Therefore, we installed an automated system with menu options for the most common requests. As a result of the menu options, our staff is able to answer more calls. In addition, we observed our rate of rescheduled appointments increased, which decreased our no show rate. We felt this was all a result of a more efficient phone system.”

- internal medicine practice

Action


One way to assess your current telephone system is to call and evaluate it yourself, remembering to call during and after business hours. In addition, you should ask your patients and staff what they like and do not like about your system. Keep the following points in mind when assessing and improving your system.

Automated system for incoming calls.

- **Create messages for your automated system.**
 - ◇ Use a voice that sounds friendly.
 - ◇ Use a conversational tone of voice.
 - ◇ Speak clearly, using everyday words.
 - ◇ If you provide a phone number, repeat it.
- **Create the menu for your automated system.**
 - ◇ Consider the following sequence of choices on the main menu:
 - ◆ Provide a choice of language (if applicable).
 - ◆ Provide instructions for medical emergencies.
 - ◇ Do not have more than 5 choices within a menu option.
 - ◇ **Possible menu options:**
 - ◆ **Option 1:** Appointments: schedule, reschedule, confirm or cancel.
 - ◆ **Option 2:** Prescription refills or to request a referral.
 - ◆ **Option 3:** Directions to your office.
 - Offer options for different forms of transportation, including public transportation.
 - Reference familiar landmarks.
 - ◆ **Option 4:** Speak to a staff person and/or leave a message for clinical staff.
 - ◆ **Option 5:** Repeat menu.
 - ◆ Further options include:
 - Nurse advice line.
 - Billing or insurance questions.
 - ◆ For an example of possible menu options refer to the [Sample Automated Telephone System Menu](#).
- **Record after hours message.**
 - ◇ Assess the automated message and menu options used when the practice is closed.
- **Educate your patients** about using the phone system.
 - ◇ Talk with them at check-in or during their visit.
 - ◇ Put up posters in the waiting area.
 - ◇ Review the phone number to call when the practice is closed (after hours).

Telephone etiquette.

- Clinicians and staff members should keep the following things in mind when speaking with patients:

- ◇ Use a friendly, conversational tone of voice.
- ◇ Speak clearly, at a comfortable pace.
- ◇ Refer to the caller by name when possible.
- ◇ Give callers your undivided attention, and try to avoid interruptions during the call.
- ◇ Use teach-back when appropriate, see [Tool 5: The Teach Back Method](#).
- ◇ Encourage questions.
- ◇ Use everyday words, and avoid medical jargon.
- ◇ Use scripts when applicable for clear answers to common questions, such as directions to your practice or preparation instructions.
- ◇ Provide guidance to staff for answering questions when a script is not provided.

Toll-free phone number.

- Consider adding a toll-free number for your office to encourage patients to call with questions.

Track Your Progress

- Count the number of complaints about accessing your practice by phone and wait time while on hold. Compare complaints before and after changes to your system.

Resources

- For additional information refer to [“How Does Your Practice Sound on the Phone?”](#).