

# Standardized Scripting Templates

## for Voicemail recordings

1. State the name of the clinic or agency
2. State that you regret the call was not picked up
3. State that the client should remain online to listen to various options
4. Provide the option to leave a voice mail message if none of the options apply
5. Indicate the time frame the voicemail will be responded to and stick to it
6. Indicate what to do if the matter is urgent (redirect the call to a warm body) or emergent (call 911).
7. *Sample message:* “Hello, you have reached the offices of Clinic X. We are not able to take your call at this time. Please leave your name, number and a brief message and we will return your call within \_\_\_ hrs / business days. If this is an urgent matter, please press/call \_ / 403-XXX-XXXX and you will receive immediate assistance. If this is an emergency, please hang up and call 911. Thank you for calling.”

## For appointment reminder calls

1. “Mr/Ms/Mrs. \_\_\_\_\_, we want to remind you about your appointment with Dr. Y scheduled for tomorrow, \_\_\_\_\_ at \_\_:00 AM/PM. Will you be able to keep that appointment? Will you call us if you find that you cannot keep that appointment? Our cancellation phone number is (403) 123-4567.”

or

2. “Hello this is \_\_\_\_\_ from Clinic X calling, to remind you about your appointment with Dr. Y on \_\_\_\_\_ day, \_\_\_\_\_ at \_\_:00 AM/PM. Please arrive at the clinic 15 minutes ahead of your appointment so the nurse may prepare you for your visit. If you are not able to keep this appointment please call 403-123-4567 to cancel or reschedule your appointment.”

*Note: If there are confidentiality issues with naming the clinic or the doctor, you may wish to just leave a message indicating the client has an appt and the date and time of the appt with instructions around cancellation/rescheduling.*

or

3. (After determining the date/time/PCP) – “Mr./ Ms./ Mrs. \_\_\_\_\_, in order for Dr. Y and his/her care team to prepare for your appointment, can you tell me the reason for your visit? Thank you. Your appointment is scheduled for \_\_:00 AM/PM on \_\_\_\_\_day, \_\_\_\_\_, \_\_\_ with Dr. Y. Will you call us if you cannot keep that appointment? Our cancellation phone number is (403) 123-4567. Thank you very much.”

### **If patient is late for appointment**

“Mr. / Ms./ Mrs. \_\_\_\_\_, your appointment was scheduled for \_\_:00, and your doctor has now moved on to their next patient. However, we will try to work you in to the schedule in the event of a cancellation, late arrival or unkept appointment by another scheduled patient. If this does not happen we will see you at the end of the session. We certainly understand if you wish to reschedule instead, but we will make every effort to see you today.”

### **If provider is late for appointment**

*(Either on check-in, or if the receptionist learns of the delay after check-in)*

“Mr./Ms./Mrs. \_\_\_\_\_, we regret to tell you that Dr. Y is running about 30 minutes late. We apologize for this delay and will keep you informed. In the meantime, is there anything that we can do for you?”

### **For No-Show follow-up calls**

1. “Hello, this is Dr. Y’s office calling. I see that you missed your appointment today. Rest assured that we are not calling to give anybody a hard time, today; we’re simply trying to get an idea of what things are happening when patients miss their appointments. I’ll read out some common reasons, and please let me know which category fits best, as to your missing your appointment today. We have:

I forgot

I no longer needed the appointment

I was running behind

I couldn’t cancel because of our clinic hours

I couldn’t cancel because I didn’t have access to a telephone

I simply didn’t cancel

Other

Please choose which one describes your absence best.

#### PATIENT RESPONDS

Thank you. I really appreciate you helping us to improve our clinic. Do you have any suggestions regarding what we could do to make it easier for people to cancel if they can't make it in?

#### PATIENT RESPONDS

OK. Well, thanks again for your help, Mr./Mrs./Ms. \_\_\_\_\_. We'll see you next time, and have a great day.

*or*

2. "Hello this is \_\_\_\_\_ calling from Clinic X. Could I speak with Mr / Ms. / Mrs. \_\_\_\_\_ please?"

"Hello Mr. / Ms. / Mrs. \_\_\_\_\_. I notice you did make it to your appointment with us we had scheduled on \_\_\_\_\_ at \_\_:00 AM/PM. To try and improve our clinic's efficiency and our patient's experiences, we are following up with clients that were not able to keep an appointment with us. If you would, please tell me what kept you from keeping that appointment.

*PATIENT RESPONDS (i.e. they forgot, they had transportation issues, a family emergency, or felt better, etc.).*

"Thank you for letting us know this Mr. / Ms. / Mrs. \_\_\_\_\_. I would like to reschedule that appointment for you if that's all right. Our next opening is on \_\_\_\_\_ at \_\_:00 AM/PM.

*If the client reschedules, establish a verbal contract, i.e.:*

"Thank you Mr. / Ms. / Mrs. \_\_\_\_\_. So you will come to that appointment or will call us if you are not able to make it? That's great. We'll look forward to seeing you on \_\_\_\_\_ at \_\_:00 AM/PM.

If you'd like, I can call you on the \_\_\_\_\_ to remind you of the appointment. Is this a good number to leave a message at?"

### **For scheduling appointments**

Receptionist: "Which provider do you regularly see?"

Patient: "Dr. Y, but it really doesn't matter to me."

Receptionist: "It really is better for you to see the same one as frequently as possible, so that he gets to know you better and can take better care of you. Dr Y is not in today, but I can schedule you tomorrow with him when he returns."

Patient: "I would rather come in today."

Receptionist: "That's fine, you can see one of his partners today, and next time we will try to get you in with Dr. Y."

*or*

Patient: "I would like to make an appointment with Dr. Y."

Receptionist: "When would you like to come in?"

Patient: "Tomorrow sometime"

Receptionist: "Dr. Y is not in tomorrow. He/she could see you at \_\_:00 today, or he will be back in on \_\_\_ day and I could schedule you then."

*PATIENT RESPONDS*

*or*

Patient: "I would like to make an appointment for next month with Dr. Y for my physical."

Receptionist: "We really try not to schedule out so far, since plans change and it can be hard to keep an appointment that is scheduled so far in advance. Would you like to come in sooner, or would you like to call back within a few days of when you would like to be seen? We will have appointments available then."

*(If patient is insistent and the schedule is open, go ahead and schedule, but make a note for someone to confirm appointment the day before)*

*or*

Receptionist: "Dr. Y's schedule is full today and we have already worked in a few emergencies. Since you are requesting a routine physical, I will need to schedule you for another day with Dr. Y. What day is best?"

Patient: “@#\$\$%!! You people first tell me something about a Same Day appointment and have asked me to call on the same day, and now that I do, you tell me that I can’t come in today! When are you going to get your @#\$\$% act together!?”

Receptionist: (*Pleasant and smiling*) “We are doing the best that we can. We have gotten so busy that we have had to schedule out a few days, but we are working hard to get back to the same day appointments. Remember when you used to call and it took a month to get in? ☺ If you really can’t wait, one of Dr. Y’s partners can get you in today, but I know that Dr. Y would really like to see you himself, since he knows all about you. He can see you at \_\_:00 tomorrow and you will be his first patient of the day.”

*or*

Receptionist: “Dr. Y’s schedule is full today, but you can see him tomorrow morning or you can see one of his partners today”

Patient: “I want to see Dr. Y, but I don’t know what I am doing tomorrow. I want to call back tomorrow.”

Receptionist: “If that would work better for you, that is just fine. Please try to call as early in the day as you can, since the schedules fill up fast and I can’t guarantee that you will get the time that you want.”

### **Remember...**

- It’s the patient’s choice – accommodate them whenever possible
- Always confirm PCP and schedule with that provider whenever possible.
- Try not to schedule out any further than 2 weeks, if possible, since the no show rate rises after that length of time
- Anything that you are scheduling for another day, try to encourage the early morning appointments. If the patient insists on a later time, go ahead and schedule (it’s the patient’s choice!)
- If the conversation is getting tense, get the point across to the patient that we want his appointment time to work for him so that he will be sure to make it.

For scheduling followup appointments *without* giving results on the phone

“Hi there, this is \_\_\_\_\_ from Dr. Y’s office calling. Dr. Y would like you to come in to go over some results with them.

PATIENT: “What’s wrong with me? Why does she want to see me?”

Nurse: “I’m not actually sure about that. Dr. Y simply asked me to call you to arrange an appointment. Does this date, \_\_\_\_\_, work for you at all?”

## For chronic disease screening and management measures

“Hi, my name is \_\_\_\_\_ and I’m calling at Dr. Y’s request to talk to you about how the X Clinic team can add to what your doctor is already doing to optimize the management of your \_\_\_\_\_ (diabetes, high blood pressure, high cholesterol, weight.”

Our X Clinic team includes \_\_\_\_\_ and a \_\_\_\_\_ (pharmacist/dietician/diabetes-RN-specialist/respiratory technologist) and the clinic’s RN Coordinator. This team was developed so that we can spend the time you need to address all your questions or concerns about your condition(s), and how we can help your to optimally manage your condition(s).

There are a few options we can offer you in this regard:

1. You can meet individually with the team members present whom you think will best meet your needs;
2. You can meet as a group with other individuals like yourself, wherein disease management is addressed generally and time is available for one one-on-one consultation with whichever team member you wish to see;
3. You can meet as a group wherein disease management is addressed generally and the group divides into smaller groups to address more specific areas of the disease management, where more in-depth discussion if desired.

Your doctor will be involved in these sessions at some point, so that he/she is aware of all that was discussed and his/her input can be utilized as well.

## For phone messages to be left for patient pick up of pre-labwork/screening requisitions

1. If leaving message for lab requisition only:

“This is the X Clinic calling. There is a lab requisition at Dr. Y for you to pick up and have completed one week prior to your appointment. You will need to fast 12 – 14 hours prior. If you have any questions please contact the primary care nurse at extension 123”.

*Note: If message has been left and is a lab requisition only, the requisition may be left at the designated station in the pre-labwork folder, for patient pick up.*

2. If leaving a message for lab requisition and screening appointment:

“This is the X clinic calling. We request that you contact us regarding pre-appointment workup instructions for your upcoming complete physical with Dr. Y. Please call the primary care nurse at extension 123”.

*Note: If a message has been left regarding “workup” instructions for completion, all paperwork (lab requests and screening appointment sheets) should be returned to designated folders and nurse, until patient returns call.*

Hopefully, this will help to eliminate any confusion on behalf of patient/staff and still maintain patient confidentiality.