

RECEPTIONIST CHECKLIST - PHONE CALLS

- ❑ Answer all phone calls within three rings.
- ❑ When answering the phone say: "Thank you for calling," give the name of the office, and your name, and finish with: "how may I help you today?"
- ❑ If a new patient is calling be sure to ask them how they heard from us? That is very important for us to know especially if we are marketing certain things for example brochures, ads, Or special offers.
- ❑ Before setting up an appointment the patient why they are calling, then set up the appropriate appointment. For example: if they are coming in for a cleaning, exam, and x-rays then schedule the appointment for the hygienist.
- ❑ Make notes in the appointment notes so everyone has a better understanding of what patient is coming in for.
- ❑ Let our new patient know they will need to come in at least 20 minutes prior to their scheduled appointment time to complete paperwork or they can go to our website print out the paperwork and bring it to the office when they visit.
- ❑ When asking for insurance information make sure you get the following information: insurance company name, member ID number, the group number, is this insurance through an employer, policyholder's name, policyholder's birth date, patient's birth date, insurance company phone number.
- ❑ When receiving phone calls from people that are trying to reach the doctor, or any staff member that is not available, get the: callers name and number, the name of the person they are calling, and a brief message. Place this message in their box.
- ❑ When receiving a phone call that was meant for somebody else please let the person on the phone know that they are going to be placed on hold so you can transfer the phone call to the direct extension.
- ❑ When receiving a phone call that is on hold thank the person on the phone for holding.