



CORE CALL FLOW OUTLINE

Greeting

Script:



Good morning/afternoon/evening, [Healthcare Center Name]. My name is [Agent's Name].
How may I assist you today? 

Tone: Friendly, Professional

Identify Caller



Verify Identity (for patient privacy and security)

- Ask for the caller's full name and another identifier (e.g., date of birth).
- Confirm relationship to the patient (if not the patient).



Establish Connection

- Determine if the caller is a patient, family member, provider, etc.

Determine Call Type



Ask open-ended questions to identify the reason for the call.



Match to predefined call types (e.g., appointment scheduling, medical inquiries).



How can I help you today 

or



Are you calling to schedule an appointment, ask about a prescription, or is there something else I can assist you with? 



Take notes.



Repeat back and confirm your understanding of what they are asking for.



Show willingness to help – “Let me take a look at what’s going on.”

Determine Acuity

Determining the acuity is assessing the urgency of the call.



Use something like a “Red-flag” list to help agents determine acuity



Acuity can be routine or urgent, though you may want more than 2 categories for your practice

- Routine: Continue assisting the patient
- Urgent: Symptoms requiring immediate attention, post-surgery concerns, etc. Usually requires immediate escalation

Urgent script:



Given what you've told me, this could be an urgent or emergent matter. Let me connect you with our medical team immediately.

Handle the call



Locate the appropriate guide/procedure/call flow



Follow specific handling procedures based on call type and acuity.



Utilize pre-determined scripts or guidelines.



Offer assistance, provide information, or transfer the call as needed.

Closing



Summarize what the call was about and what you did



Confirm resolution



Identify next steps (if any)

Possible script:



Thank you for calling [Healthcare Center Name]. We have [summary of actions taken]. Is there anything else I can assist you with today? Have a great day! 

Document call



Record key details of the call in the appropriate system or log.

Include:

- Caller's name and relationship to patient
- Call type and acuity
- Actions taken, information provided, or referrals made
- Any notable comments or feedback from the caller



Ensure compliance with privacy regulations (e.g., HIPAA).