

SIMPLE STANDARD CHECKLIST

SIMPLE AS POSSIBLE – the first and last rule of contact center flow / scripting design

Remember the first **RULE OF ONE!**

ONE place to go, for ALL flows, fitting ONE standard format

Creating the Standard Format for call flows:

- ☐ Outline the reasons patients call. If there are many choices, find categories to present first, so you are showing just a few options.
- ☐ Keep choices minimal: 2-3 at one time is ideal; 5 or less if at all possible.
- ☐ Order the choices by PRIORITY not alphabetically
- ☐ Put instructions for all other applications WITHIN the flow / scripting
- ☐ Keep the language simple and direct
- ☐ Use color and formatting to make reading and skimming easy.
- ☐ We use background colors for different types of instructions.

SCRIPTING THE AGENT SAYS
INFORMATION TO LOOKUP
ACTIONS TO PERFORM
CALL HANDLING

- ☐ We use different text colors for scripting answers. **YES** is green. **NO** is red.

- ☐ Information to look up should be:

(a) on the page whenever possible

(b) if not possible, easily accessible with just a hyperlink

(c) if the agent has to go through a series of steps, as in instructions in a separate application, do the following:

(1) present the instructions for the other app inside your workflow

(2) give the instructions a header that can be collapsed by default for users who've learned, but can be expanded for users who haven't learned or have forgotten how to do it

(3) find ways to *minimize* the steps and clicks as much as possible.

- ☐ For Information or Actions:

Have a standard text and instruction format for guiding users through other applications:

Making instructions simple and skimmable:

UI elements are **bolded** with their UI name:

New Encounter

Provider Preferences

First Name

Submit

Actions have set verbs that are italicized:

Go To

Select

Right-Click

Enter

Close

Start instructions with verbs as much as possible

Select **New Encounter**

Go to **Search** and enter the doctor's name

- ☐ If using Microsoft Word, use Word's Headings feature to make the branching collapse:

Here is our sample file when opened:

I'm sorry to hear about your injury. What are your symptoms?

Determine if symptoms could be **Urgent/Emergent**: [Red Flag List](#)

- ▶ ■ **U/E-YES** Symptoms could be urgent/emergent
- ▶ ■ **U/E-No** Symptoms do not seem to be urgent/emergent

Determine whether the patient is already in the system. Instructions:

Click **Patient Search** inside the EHR.
Enter **First Name** (at least 2 letters), **Last Name** (at least 2 letters), and **Date of Birth**
Click **Search**

- ▶ ■ Patient **IS** in system
- ▶ ■ Patient **Is NOT** in system

Here is the same file as a user navigates the structure:

Call Type – Injury

I'm sorry to hear about your injury. What are your symptoms?

Determine if symptoms could be **Urgent/Emergent**: [Red Flag List](#)

■ **U/E-YES** Symptoms could be urgent/emergent

Call the nurse line.

If no answer, *page* the provider

If no response within 5 minutes, recommend Urgent Care/ED

■ **U/E-No** Symptoms do not seem to be urgent/emergent

Determine whether the patient is already in the system. Instructions:

Click **Patient Search** inside the EHR.

Enter **First Name** (at least 2 letters), **Last Name** (at least 2 letters), and **Date of Birth**

Click **Search**

■ Patient **IS** in system

- Instructions:

Determine when patient was last seen:

Double-Click the patient name in the search results

Determine the last **Appointment Date**

- o Patient Seen Over 1 years ago

Is your injury related to Workers Comp?

- **WC-YES**

Determine if caller already completed Workers Comp [questionnaire](#)

- o **WC-File YES**-It's completed

Schedule as new consult

- o **WC-File NO**-It's NOT completed

Send caller the [Workers Comp Questionnaire](#)

Advise caller to submit per instructions on the [form](#)

Close the call (jump to closing section)

[Download the Sample Word File Here.](#)

Make Your Life Easier with AI Flow Software

AI and dynamic software offer numerous advantages over creating workflows in Word when it comes to managing agents. Here's why:

Automation: AI and dynamic software can automate repetitive tasks, allowing agents to focus on more complex and high-value activities. By automating routine processes, such as data entry or email responses, agents can work more efficiently, saving time and effort.

Flow and Documentation in ONE place: AI Software makes the Flow interactive so it also serves as a source of documentation for every encounter. This improves efficiency, reduces training time, and dramatically increases consistency.

Integration with your EHR/PM: some software will integrate with your EHR/PM system, allowing service to be even more personalized and storing records of every encounter in the patient record.

Personalization: With AI and dynamic software, agents can provide personalized experiences to customers. These technologies can analyze customer data and preferences to tailor interactions, resulting in enhanced customer satisfaction and loyalty.

Easier management: When flows, scripts and docs are integrated in one platform, it's simpler to tailor tools and resources to agent needs. CareDesk, for example, allows no-code customization with CareFlow Designer, giving you access to over 13 question types and allows over 7 types of logical branching plus built-in clinical decision support.

Central Record of Service: With a single view of the customer, agents can deliver more informed, efficient service. And managers get enhanced visibility to monitor quality, compliance and agent performance without blindspots from disjointed data. Agents have full context of past interactions, and different agents can hand-off and collaborate seamlessly. Central records allow performance metrics like first-contact resolution, hold times, and more to be comprehensive and accurate.

Real-time data analysis: AI-powered software can analyze data in real-time, providing agents with valuable insights and recommendations. This enables them to make informed decisions quickly, leading to improved customer service and problem-solving abilities.

Multichannel support: AI-powered systems can seamlessly handle customer inquiries across multiple channels, such as social media, chatbots, emails, and phone calls. This ensures a consistent customer experience and allows agents to manage interactions from a centralized platform.

Enhanced efficiency: Dynamic software allows for easy collaboration and streamlined workflow management. Tasks can be assigned, tracked, and updated in real-time, ensuring efficient task allocation and progress monitoring. This eliminates the need for manual coordination and reduces the chances of miscommunication or missed deadlines.

Scalability: AI and dynamic software are highly scalable, making them suitable for businesses of all sizes. Whether an organization has a small team or a large support center, these technologies can adapt and grow along with the business requirements.

These benefits make AI and dynamic software a better choice and an easier method for managing agents and improving overall productivity and customer satisfaction.

For a demo of CareDesk, just view this video at your convenience.