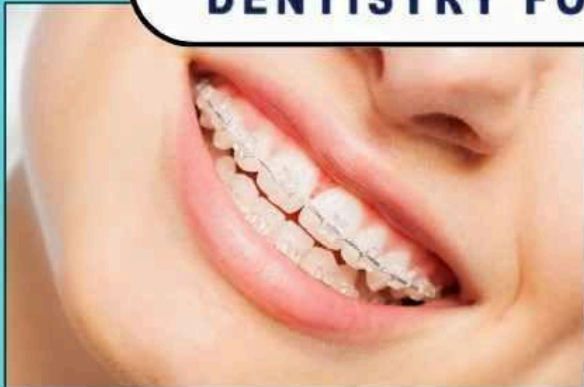


# DELUXE DENTAL

DENTISTRY FOR **KIDS** & ADULTS



**BOOK OF KNOWLEDGE**

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# Call Center

## Call Center Monitoring Procedure / Performance Policies / Employee Consent/ Outgoing Call Performance Matrix Policy / Procedure

Employees should strive to minimize the number of missed calls to ensure excellent customer service. Make certain to discuss expanded job duties with your immediate manager to ensure an appropriate performance target for daily call goals.

The maximum number of missed calls per day should not exceed 10.

Consistent failure to meet this standard over a 5 day period may result in further action, including retraining, mentorship, lateral company shift, or dismissal.

If an employee misses 25 or more calls in a shift, they will be considered that day eligible for further retraining, mentorship, a lateral company shift, or dismissal.

When scheduling new patient appointments make certain to have adequate time before the end of day schedule.

Dedicated call center staff are expected to make 150 outgoing calls per day, assuming their job duties primarily involve call production.

Failure to achieve the 150-call milestone over a period of five consecutive days will result in an employee evaluation

Based on the evaluation, the employee may be referred for continued training and mentorship.

If after additional training and mentorship the employee doesn't achieve performance expectations an employee evaluation summary review will be generated by management to make a recommendation for reassignment, additional training, or dismissal.

## **Call Center Continued Monitoring of Performance**

The call center management team will monitor the total number of outgoing calls per extension and a number of missed calls for each employee on a daily basis. Generating weekly performance summaries highlighting the number of total outgoing calls generated and missed calls for each employee.

Performance Evaluation: At the end of each day, the management team will review the reports to identify employees who have not achieved outgoing call expectations and missed calls not exceeding more than 10 calls per shift.

Initial Feedback: Employees who have not achieved outgoing call expectations and or have also missed more than 10 calls consecutively over a 5-day period will be provided with a summary review, feedback, and guidance on improving their performance.

Continued Monitoring / Retraining/Mentorship: Employees who consistently miss call expectation goals and or miss more than 10 calls per day for 5 consecutive days could be either enrolled in a retraining program or assigned a mentor to help improve their performance.

Lateral Company Shift: In some cases, if an employee's performance does not improve despite retraining or mentorship, they may be considered for a lateral shift to a different role within the company where their skills may be better suited. This will be identified and considered in an employee evaluation summary review.

Dismissal: If an employee fails to meet the performance standards after the above steps have been taken, an employee may be terminated, reassigned, or dismissed from the company.

## How to lead a call

When making appointments and speaking to patients on the phone it is important to lead them. Introduce yourself and where you are calling from, disarming them gets their attention off whatever else they're doing and gets them focused on you. Politely explain the purpose of your call. When setting up an appointment, tell them a date and time. "I have you all set up for Friday the 10th at 2:00" instead of "What time works well for you?" or "How about Monday at 2:00?". This assertive confidence will more likely end up with an appointment. The patient will often make the time work out for them. Giving them too many options can delay some patients and end with no appointment made.

## Phone Scripts

### Answering Calls Script:

**You:** "Thank you for calling Deluxe Dental, this is (Your Name), how can I help you today?"

**Patient:** "Hello, I'd like to schedule an appointment."

**You:** "Have you been to our office before?"

**If they have been to the office:** "Okay great, what is your first and last name and what location do you visit?"

**Patient:** "Thank you, I have you all set up for next Friday the 17th at 1:00 we look forward to seeing you."

**If they are a new patient:** "Okay great, let me start by getting some information."

**If they are a new patient** you will collect all needed information i.e. full name, address, two phone numbers, birth date, email, social security, insurance and member id number and lastly make sure you have the **REFERRAL SOURCE**.

\*\* You will schedule this appointment in the correct section at a reasonable time for the patient if we have it available.

**MAKE SURE WHENEVER YOU MAKE AN APPOINTMENT BEFORE YOU HANG UP THE PHONE YOU VERIFY THE APPOINTMENT DATE AND TIME WITH THE PATIENT. ALWAYS SAY THANK YOU AND HANG UP AFTER THE PATIENT THAT WAY IT ELIMINATES ANY NEGATIVE FEEDBACK.**

You could slam the phone down and the patient could still be on the phone and hear the noise and assume you had an attitude with them and when they come in typically that's the first thing a customer of any sort will remember "that you had an attitude" and that could lead back to our employer and we don't want that, we want our customers to feel appreciated whenever they call or come into our location so just be alert at all times in the office and on the phone. A good way to always start the phone call off good is to **SMILE**, when you smile while over the phone it helps ease the awkward tension on the phone and makes the call go over easy and hopefully that will avoid the patient to feel otherwise.

## Recall Script:

**You:** "Hello this is (Your Name) calling from Deluxe Dental may I speak with (Patient's Name)?"

**Patient:** "This is she/he"

**You:** "The reason for my call is to inform you that you are due for a 6 month cleaning and exam lets get you scheduled as soon as possible."

**Patient:** "Okay, sounds good!"

**You:** "I have you all set up for Tuesday May 10th at 11:00 am"

**Patient:** "No I have an appointment that day"

**You:** "Okay no problem! We will move it to Friday the 13th at 2:00?"

**Patient:** "That sounds good I'll take that appointment"

**You:** "Okay so we will see you on Friday the 13<sup>th</sup> at 2:00, if anything comes up just give us a call, we will also give you a call the day before to confirm your appointment."

**Patient:** "Okay thank you bye"

**You:** “Thank you and have a great day” (DON’T FORGET TO SMILE)

\*\* You will schedule this appointment in the correct section at the agreed time.

**MAKE SURE WHENEVER YOU MAKE AN APPOINTMENT BEFORE YOU HANG UP THE PHONE YOU VERIFY THE APPOINTMENT DATE AND TIME WITH THE PATIENT. ALWAYS SAY THANK YOU AND HANG UP AFTER THE PATIENT THAT WAY IT ELIMINATES ANY NEGATIVE FEEDBACK.**

### Treatment Script:

**You:** “Hello this is (Your Name) calling from Deluxe Dental may I speak with (Patient’s Name)?”

**Patient:** “This is she/he”.

**You:** “The reason for my call is that the doctor was reviewing your chart and our records indicate you have some unfinished treatment. It is important to get this taken care of so we can prevent future damage to your teeth.”

**Patient:** “What days do you have available?”

**You:** I have set you up for August 27th at 1:00 pm”

**Patient:** “Yes, I will take that”

**You:** “Okay perfect! We look forward to seeing you on the 27th at 1:00 pm.”

**Patient:** “Okay thank you bye”

**You:** “Thank you and have a great day”

**ALWAYS MAKE IT PERSONAL WITH THE PATIENT, TRYING TO CONNECT WITH THE PATIENT ON A PERSONAL LEVEL MAY EASE POSSIBLE TENSION. INSTEAD OF SAYING “SO YOU CAN GET IT TAKEN CARE OF” TRY SAYING “SO WE CAN GET IT TAKEN CARE OF”. TELL THE PATIENT THAT YOU (PERSONALLY) LOOK**

**FORWARD TO SEEING THEM LETS THEM KNOW THAT THEY ARE APPRECIATED.**

**How to Handle an Upset Patient on the Phone:**

***1. Example: Patient wants refund***

Patient: "I was not satisfied with my dental work, I got a crown done and I don't like it. I want my money back. I never said I wanted my tooth to be this color!"

Response: "I am so sorry sir, what is your name and date of birth so i can get your account pulled up?"

Patient: "First, last name 1-2-34, i want to speak to the manager right now!"

Response: "Okay what i can do for you is send your information over to our office manager and biller via email and you will hear back from them within 24-48 hours."

Patient: "No, I want to talk to someone right now!"

Response: "if you'd like i can put you on a brief hold and call her office to see if she is available for you, give me just a second."

At this point you don't want to seem as if you do not care or won't try to contact anyone for them, call over to your office manager and briefly explain the situation, most likely you will be told to send them an email and repeat the 24-48 response time.

Response: "Okay sir sorry for the hold, i was not able to get an office manager for you at the moment so again i am going to get a good phone number for you and send them an email and you will hear back from them within 24-48 hours."

If the patient continues as they want someone right now, apologize for the inconvenience and reassure them they will get a call back. There at this point is nothing more you can do.



## How to Handle an Angry Patient in the Office:

### **2. Example: Patient is upset about waiting**

Patient: “Excuse me, I had an appointment at 1pm and it's 2pm. How much longer do I have to wait?! This is ridiculous. What's the point of an appointment if you're not going to get me in on time???”

Response: “I am so sorry for the wait ma'am i do know our doctors can sometimes get caught up on treatment but if you give me one second i can check to see if i can give you an estimate what is your name? Again I am sorry about the wait.”

At this point you will get up and check to see where her chart is in order and then check the rooms. If you notice there is an empty room try to get an assistant to see if it's been cleaned and if so ask if you can seat the patient and if you get the ok then go ahead, but always seat whoever is next in order, even if it's not the angry patient.

**BUT FIRST BEFORE YOU SEAT**

Response: “I am so sorry ma'am it does look like there is 1 person about to be sat right now and then you will be next, i do see the doctor finishing up too do you should be sat within the next 10-15 mins. I am again so sorry as the doctors got tied up.”

Patient: “That's stupid! Why did I even have an appointment if you're going to be so behind, you shouldn't have so many people or be taking walk-ins!!!”

Response: “I am sorry this was not expected as treatment can take a little longer than usual. If you don't want to wait I can always try to reschedule for an early morning appointment so you can get in and out and not rush anyone during their appointment. I am so sorry for the inconvenience.” We are one in a FEW that take medicaid.

## How to Handle a Patient Who Wants More Than Just a Copy of Their X-Rays:

Initial fee of **\$24.48** per request for a copy of the record

Paper copies:

**\$1.22** per page for the first **20** pages

**\$0.61** per page for pages **21 through 50**

**\$0.24** per page for pages **51 and over**

This is posted at the front desk for the front staff to address whenever a patient comes in wanting more than just a copy of x rays. For example if a patient comes in asking for their dental notes, tooth chart or multiple copies of x rays then this would apply. Always tell the patient documents will take 24-48 hours to be prepared when they call.

Make sure you make the patient aware that there will be a charge per michigan law if they are wanting more than just a copy of their x-rays. And for that they only get ONE copy per lifetime, any time they get a second or third copy of an x-ray then this would apply.

If they want you can show them the posted paper and if they question the validity tell them this is something they can find right on the michigan.gov internet page.

Make sure you make note in the patient notes that they picked up documents, what document and if they paid for the documents. This must be noted for future reference. Put payment in account like normal if they do pay for the documents.

## How to Handle Someone Calling on Behalf of Someone Else:

### ***3. Example: Girlfriend calling on behalf of boyfriend***

Patient: “This is \_\_\_\_\_ girlfriend and i'm calling because he got teeth pulled yesterday and you guys didn't give him any medication, he needs something he is in pain.”

Response: “okay ma'am i am going to need to speak to \_\_\_\_\_ as it is policy and cannot discuss personal information with someone other than him, can you please put him on the phone?”

Patient: “he is in pain he cant talk and asked me to call, why can't you just look at his account?”

Response: “I'm sorry but we cant do anything without speaking with \_\_\_\_\_ first.”

Also if you inform the patient that they can sign a document stating they give us permission to discuss future treatment with whomever they put on said document.

Example: “ I \_\_\_\_\_ give \_\_\_\_\_ permission to talk and discuss my treatment and account from Deluxe Dental.”

## How to forward a call

### Steps:

1. Place patient on hold
2. Press new call and dial extension of the person/office you are trying to reach
3. Confirm they can take the call then end call
4. Hit the transfer button
5. Dial appropriate extension
6. Hit the transfer button again

## How to change outgoing area code

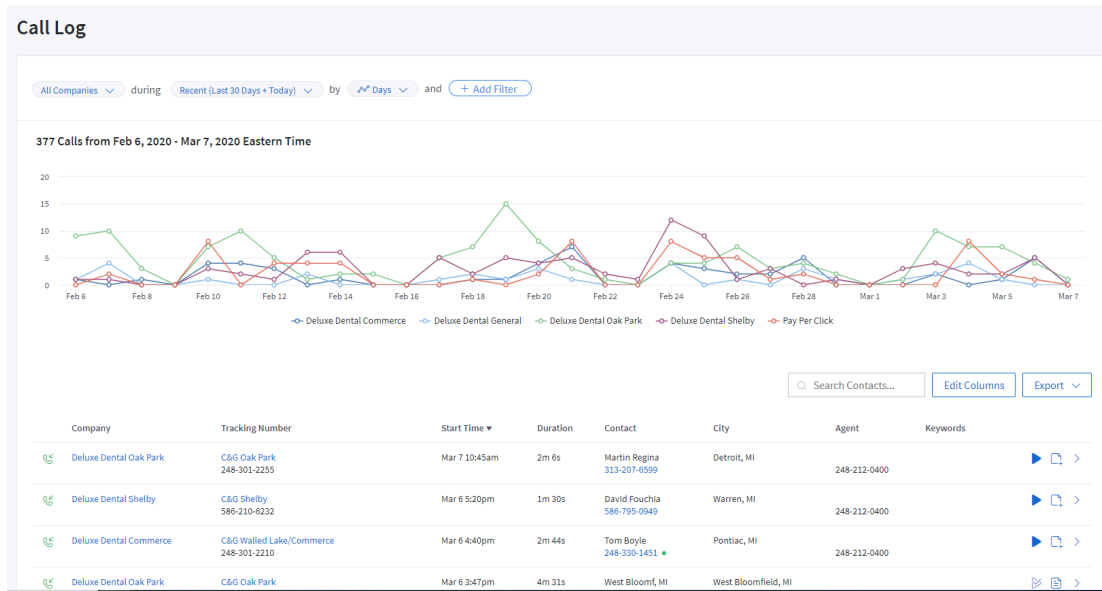
### Steps:

1. Dial the area code, \*\*, then dial the # you are trying to reach in order to call with the appropriate outgoing area code.

# CallRail

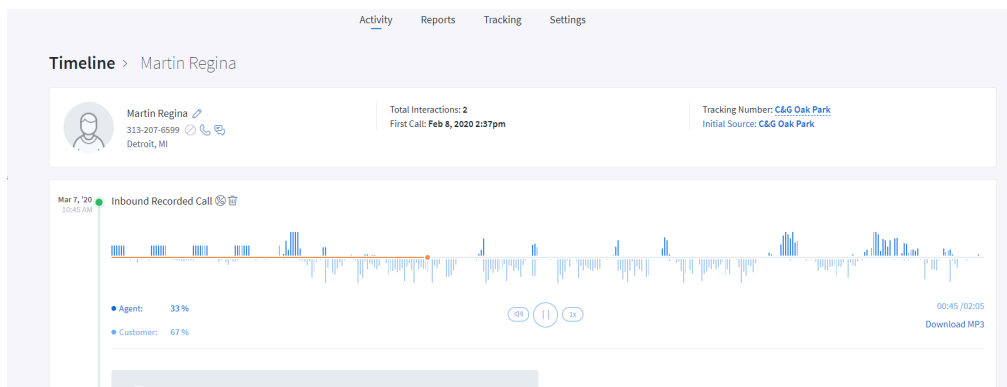
## Steps:

1. Log on to CallRail

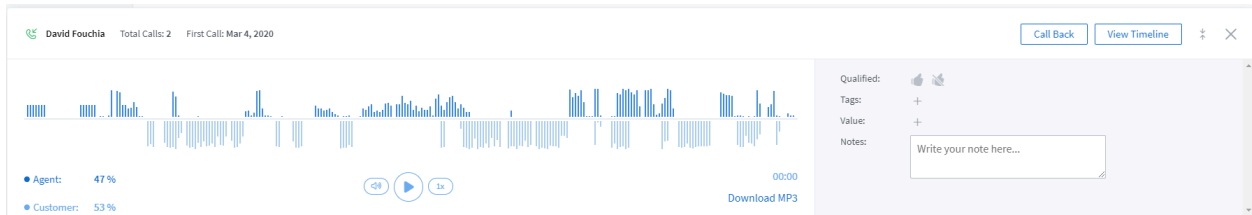


2. Put headphones in if the computer doesn't have speakers

3. Play back each call



4. Write notes of what was found on each call ie: called pt to make appt, pt will call back at a later date.



5. If there is a problem with the way the employee handled the call, download the file. Send the downloaded file to the employee letting them know how they should handle things in the future. You must attach Frank and SanJuana to the message before sending.

