

Greeting New Patients

Rose Jacobs, CA

You only have one chance to make a first impression. This month's column will outline the best front desk procedures and scripts to communicate a lasting, professional first impression of your clinic.

Every new patient's first impression of the clinic begins with that first phone call to your office. The front desk assistant must be prepared any time the phone rings and a new patient is calling to make the first appointment with your doctor. All clinics should have a "new patient information" form to complete before the new patient is added to the appointment schedule. This form should include the following patient information:

- Patient's full name. (Always ask for the proper spelling.)
- Is the patient in pain?
- Who referred the patient? (Be sure you praise the referrer if your clinic has a working relationship with the person.)
- Home and work phone numbers.
- Home address.
- Major complaint or health concern.
- Is the complaint related to employment, an auto collision, or personal injury?

Patients in pain need to be scheduled as soon as possible, preferably within a couple of hours from the time they call. If you don't accommodate them, they'll go elsewhere. If there is no suffering, offer two appointment times that your doctor has available that day, or within the next 48 hours, if at all possible. Before ending the conversation, confirm the date and time and ask if the patient knows where your office is located.

One chiropractic assistant script reads:

CA: "Mrs. Smith, I have your appointment time with Dr. Parker scheduled for Tuesday, July 17 at 10:00 a.m. Please arrive at our office no later than 9:40 a.m., as we'll need to get some information from you. If you have insurance benefits that may cover the doctor's fees, bring that information with you. Do you know where our office is

located?"

Patient: "Yes."

CA: "Wonderful, Mrs. Smith. We will look forward to seeing you at 9:40 a.m. on July 17."

Always allow your callers to hang up first. If the patient needs directions, I recommend having them typed out at the front desk, so that this procedure is a "no-brainer." If your office's location is difficult to find, I encourage you to design a map that may be mailed, faxed or e-mailed to your patients.

If the appointment is made more than 24 hours in advance, call the patient the morning before the appointment to confirm the date and time.

Front-desk CAs must be prepared for a new patient to arrive a minimum of 30 minutes before the appointment time. You must have all the new patient information forms gathered and ready on a clipboard or inside a portfolio with a pen that writes properly. Keep a lookout for the new patient so that you are ready with a friendly greeting and a smile. When the patient arrives, this should be your script:

"Hello. You must be Mrs. Smith. We have been looking forward to seeing you. Please sign in. You will need to sign in on each visit to our office. Have a seat in our reception area and I will be with you in one moment."

Retrieve the new patient forms, and sit next to the new patient. Extend your hand to shake hands. Say the following:

"I'm Rose, Dr. Parker's assistant. It's nice to meet you. Dr. Parker will need some information to help him during your consultation today. If you need any assistance, I will be happy to help you. If you brought any insurance information, I can make a copy of that for your file. When you have completed the information for Dr. Parker, please bring it to the front desk so that I can complete your file for the doctor. (If the new patient was referred by someone the clinic has a relationship with, make mention of the person at this time.) May I offer you a beverage?" (I keep tea, orange juice, lemonade, and bottled water in our clinic. For a special touch, we have mugs with our clinic's logo printed on the side to serve the beverage in. We then give the patient a mug to take home after their visit.)

When the patient returns the information to the front desk, the assistant should have something ready for the person to read while waiting to meet the doctor. I suggest one of the following: your clinic's newsletter or weekly information flyer; a pamphlet on the patient's particular health condition; or your clinic's testimonial album. The front desk assistant should review the papers to make sure that all information and required signatures have been completed, and to organize the patient's file properly.

The completed file, of course, goes to the doctor. When it's time for the patient to go to the consultation room, escort the patient and give a quick tour of the office and introduction to the other staff members. As you invite the new patient to sit down in the consultation room, I urge you to make a positive statement about the doctor. This is the statement I personally use in our clinic:

"Dr. Parker is a wonderful chiropractor. He has been such a blessing to so many people in our community. I know if he accepts you as a patient, he feels confident that he will be able to help you as well."

The front-desk CA must be ready for the new patient to return to the front desk area to make a follow-up or "report" appointment, and to collect the day's service fees. Offer the patient two or three appointment times, and have the doctor's fee slip at the front desk. It does not give the patient a good first impression of the clinic if you don't know what the patient owes.

After confirming the next appointment, and collecting for the day's services, make an appointment card and a receipt with the fees and payment noted for the patient's records. Hand them to the patient. Your closing statement should be:

"It was very nice meeting you today. I will see you on (date) and (time). Have a great day."

Lastly, the front desk assistant should address and mail out "welcome" cards or letters to the new patients, and a "thank you for your referral" card or letter before going home. I advise the doctor and all staff members to sign both. Add to the doctor's "call" list the names and phone numbers of all the new patients and referrals, so the doctor can personally phone them before going home that day.

Be prepared with your new patients' procedures and scripts. Remember - you will never get the opportunity to welcome that new patient into your clinic again.

So, until next time, CAs: Go out and make a difference.

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JULY 2001