

CA Phone Scripts:

When you answer the phone, you are answering the practice lifeline! You only get one chance to make a good first impression, don't blow it.

PHONE RINGS

CA: "It's a _____ at Lazar Spinal Care! This is _____ I can help you!"
(SMILE)

Marvelous Monday

Terrific Tuesday

Wonderful Wednesday

Thrilling Thursday

Fantastic Friday

Super Saturday

If unfamiliar person is calling wanting to make an appointment (Use the Greensheet):

CA: "I can definitely help you with that! May I get your name? Hi, Alice! When was the last time you saw the doctor?"

Last Week:

CA: "Great, when would be better this morning or afternoon?"

First Time Patient: (Start Green Sheet)

CA: "Great, who may we thank for referring you? "

Alice Smith.

CA: "Alice is TERRIFIC, she is one of our favorite patients, we just love her, you know she refers a lot of her friends here! What is the best phone number to reach you during the day? Mrs. Jones, Is this appointment for your entire family???" (plant the seed)

Let's find a convenient time for you. It looks like I can get you in later today or otherwise tomorrow? Morning or Afternoon? 9:15 or 10:15?

Mrs. Jones if you'll allow me to get some information now, I will be able to start your file and save YOU time when you're in the office. I will send you a confirmation email with instructions for your first appointment including a link to fill out your forms online and a map of how to get here. May I get your email address? Excellent. The email you will receive has some very important information. Please read it carefully before your visit.

The last thing I need is whether you want email or text message reminders the day before your appointments? And your cell phone carrier?

Thank you for your cooperation Mrs. Jones, we look forward to seeing you at 9:15."

If no email: "Do you know where our office is located? (yes or no) - Great – we are located on Zeeb Rd. across the street from Meijer right next to the car wash. Again, we look forward to meeting you!"

If the patient asks - *How much does it cost?*

CA: "One of the great things about our office is that the doctor would never charge you to sit down and talk with him about your needs!! Then, if he feels he can help you he will be able to determine what YOU may need and how much it will cost."

Sometimes people will start the conversation with a question, always go back and find out how they heard about our office first. Then schedule them in. If they ask again, then answer the question and go back to scheduling them in. The idea is that we prefer to answer as many questions as possible in the office after they have seen our extraordinary customer service.

- *Does treatment cost extra?*

CA: "Yes, care is an additional charge, but the initial consultation is at no charge. Let's get you scheduled in to see if the doctor can help."

- *How much does it cost to come in and see the doctor?*

CA: "One of the great things about our office is that the doctor never charges to sit down and talk to you about your problems. Then, if he feels he can help you he will be able to determine what YOU may need and how much it will cost."

- *What are your initial fees?*

CA: "One of the great things about our office is that the doctor never charges to sit down and talk to you about your problems. Then, if he feels he can help you he will be able to determine what YOU may need and how much it will cost."

(or)

"Our exams start at \$112, and if YOU need to have x-rays taken they can be up to \$293. But your consultation will be at no charge so let's schedule you to come talk to Dr. Lazar and see if he can help you. Do you prefer.....?"

- *Do I have to take x-rays?*

CA: "The doctor won't be able to determine if you are going to need x-rays until he has had a chance to speak with you and perform an examination. I want you to know that he will only take x-rays if they are necessary for your care."

- *I don't want any x-rays. I just want him to adjust me like my other chiropractor.*

CA: "I understand. I will be sure to let the doctor know you are concerned about taking x-rays. Let's get you scheduled in for_____."

- *Will the doctor treat / adjust me today?*

CA: “Once the doctor has had a chance to examine you, he will be able to determine if he can help you, and whether he can adjust you today. I will be sure to let him know you are concerned about getting adjusted today.”

- *I need to be adjusted today.*

CA: “I understand... I’ll be sure to let the doctor know you are concerned about getting adjusted today.”

- *Do you accept Insurance?*

CA: “We work with many insurance companies. Why don’t you bring your insurance information with you we will be happy to check all your benefits for you.”

- *Does your office accept Blue Care Network?*

CA: “I’m sorry, we are not affiliated with Blue Care Network (HMO), although we do work financially with all our Blue Care Network (HMO) patients. Let’s get you scheduled in for _____.”

- *Do you accept Medicaid?*

CA: “I’m sorry, our office is not affiliated with Medicaid, although we do work financially with all our Medicaid patients. We don’t like to turn anyone away for financial reasons. Let’s get you scheduled in for _____.”

Those are the majority of the New Patients phone call questions or situations. Master these scripts and remember it’s not what you say; it’s how you feel about what you say.

Calls for the Doctor:

CA: “I’m sorry Dr. Lazar is currently seeing patients. Can I get your name, who are you with, and what this is regarding. Great. How about a phone number. I’ll be sure to give the doctor the message.”

Unless you are certain that it is a call I was waiting for, take a message. People will say anything to get around you. (i.e. they are returning my call, they are a friend, it’s urgent, etc.). Always follow the procedure above and write down all the information. Don’t tell them I will call them back. Tell them “ I’ll be sure to give the doctor the message”.

Missed Appointment Script: (10 min. Late)

CA: “Hello, May I speak with _____?
Hello _____. This is ____ from Lazar Spinal Care. Did I make a mistake on your schedule? I had you scheduled for _____. (strategic pause) No Problem, let’s go ahead and reschedule that for you.”

1. If you can get them in now:

CA: "Great we'll see you in a few minutes."

2. If not in the morning:

CA: "Then let's get you scheduled in this afternoon to keep you on schedule."

3. If not in the afternoon,:

CA: "Then let's get you in tomorrow to keep you on schedule. Great! We'll see you at _____."

Patient must make up their missed appointment to follow the care plan and get the care they need!!!!

Stop Care Script: (If a patient calls wanting to stop care.)

CA: "I completely understand. Let's get you scheduled in today so that the doctor can evaluate you for your release and we can prepare to close your file."

Always get the patient in the door so the Doctor can speak with them.

I don't want to come in anymore. Why do I have to come in again? I'm quitting care, etc.

CA: "I totally understand. We have to prepare to close your file. Also, the doctor will do a stop care evaluation on you so he can mark where you left off. He can see you at _____."

End of Night Call (Pink) Sheet:

Recalls made, 1st adjustment calls, patient savers, special reminders. Written on the sheet: patient visits/day, money collected/day.

CA SCRIPTS FOR FIRST VISIT

Greeting The New Patient: First Visit

As the new patient walks in the door of our office for the first time, they are scared of the unknown and unsure if they are in the right place. The front desk CA is expecting them, makes eye contact, and with a beautiful smile comes out from behind the desk to warmly shake their hand(s) and greet our welcomed guests by name:

CA: “Good morning! You must be Mrs. Jones? We’ve been expecting you. ‘I’m____, I’m the one you talked to on the phone this morning. I’m so glad to meet you!! Thank you for being on time (if not on time, “thanks for being here!”) Check in here with me as you will on each and every visit and follow me to a special chair I have for you.

Sit patient at new patient chair at the lower counter at the front desk. **Be sure to get their driver’s license and insurance card(s).

If forms filled out online:

CA: “Thank you so much for filling out your forms online. We do our best to keep a green office. I will need your driver’s license and insurance card (if you plan on any insurance reimbursement.)”

If patient has to fill out forms:

CA: “Mrs. Jones, I have one simple form for you to complete. It takes about 4 minutes. I will need your driver’s license and insurance card (if you plan on any insurance reimbursement.) If you need any help at all I’ll be right here for you!!!”

CA will check to ensure form is filled out completely and signed. Be sure the referral section is completed. If not, check the green sheet. If no referral info, ask:

CA: “Mrs. Jones, who can we thank for referring you to our office?” _____. We love Alice! I’m so glad she sent you in. She sends us a lot of wonderful people!”

If the patient has additional questions:

Do you take my insurance?

CA: “The most important thing right now is to find out if the doctor can help you. If he determines that he can, I will have this research done for you. I will get a copy of your insurance card

Will I get adjusted today?

CA: “The doctor won’t be able to determine if he can adjust you until he’s had a chance to examine you, but I’ll be sure to let him know you are concerned about getting adjusted today. So, let’s get your paperwork filled out and get you in with the doctor.”

Do I have to have X-rays?

CA: “The doctor won’t be able to determine if he needs x-rays until he’s had a chance to examine you, but I’ll be sure to let him know you are concerned about x-rays. So, let’s get your paperwork filled out and get you in with the doctor.”

Once you have prepared the consultation room (perfectly tidy, Day 1 Video queued), escort the new patient to the consultation room:

CA: “Mrs. Jones please follow me. I have a special room ready for you. (Have them sit in chair) Mrs. Jones I’m going to show you a short 5-minute video that will help you help us understand your needs better. Dr. Lazar will be right with you.”

Note: Rarely, a patient will have an abundance of concerns or questions regarding money. It is important to reassure the patient that their questions are important and will be answered clearly. Reassure them that lots of patients have similar concerns, and what they find is that there are no surprises in this office regarding finances, and that patients are very comfortable here. Tell them that our first priority is to find the cause of their problem and see if our doctor can help.

CA: “I will let the doctor know you have concerns about finances and if he can accept you for care, everything will be explained clearly to you.”

Then proceed normally as you would, no further discussion is needed.

If however, the patient’s questions are pertaining to the first visit fees, reassure them in the same way, and then attach a post-it note on the the intake AFTER the patient fills it out, alerting the doctor that he needs to go over fees after the consultation prior to doing an exam and x-rays. The post-it will simply say “**FUF**” meaning ‘fees up front’. It is of primary importance that the patient, staff, and doctors remain focused on patient care, not fees. In our first call we indicate there is no charge to sit down and talk to the doctor, if the issue of fes is ever brought up during the first call. Normally, the doctor will not discuss fees until after the exam and x-rays, before bringing the patient up to the front desk. **Discussing first visit fees with the patient after the consult will only be done when the CA alerts the doctor in this rare circumstance**, and it is done so that we keep our promise that there are no financial surprises in our office.

At this point the doctor will perform the consultation, exam, and x-rays as detailed in the doctor’s portion of this manual. Afterwards, the doctor will personally walk the patient up to the front desk and specifically release the patient to the front desk CA as the patient stands with the doctor and listens to the conversation.

DC ADDRESSING THE FRONT DESK CA: “ _____ (CA name), today we did an exam for Mrs. Jones and did a complete set of x-rays. Please provide a special

appointment tomorrow for her report of findings allowing us some extra time. Plan on an hour, and make sure that Mr. Jones will be here as well.”

Dr. turns to patient, makes eye contact and says:

DC ADDRESSING PATIENT: “ _____ (front desk CA name) will find a convenient time for you and Mr. Jones to see me tomorrow. I hope that I can help you.

Dr. will Walk away immediately and let front desk do their job.

Front Desk CA First Visit Release:

The front desk CA will know the exact referral source, and will thus know exactly what the first visit charges will be before releasing the patient.

CA: “Mrs. Jones, let’s create a time for you and Mr. Jones to come together tomorrow. Is morning or afternoon better for the two of you? Excellent! Will 9:00am or 9:45am be easier? Perfect! I will clear the schedule for you and Mr. Jones at 9:45am tomorrow morning and plan to be here for a full hour.”

Now I see you received a consultation with the doctor because you were referred by Nancy, there was no charge for your consultation! From now on when you refer in your friends and family, tell them to mention your name and they will never be charged for a consultation with the doctor.

- Your examination was _____ (don’t say dollars, just the numbers “one twenty”)
- Your x-rays were _____ which includes the doctor’s analysis, and
- Your report of findings which you and Mr. Jones will receive at tomorrow’s visit.
- Your total is _____. How would you like to take care of that today? We accept cash, check, or credit card.”

Process the payment and the the patient a receipt and confirm their ROF for tomorrow:

CA: “Mrs. Jones, we sure we can help you and look forward to seeing you and Mr. Jones tomorrow at 9:45am.”

If patient is short the money or didn’t expect to pay today, say:

CA: “No problem, how much are you lacking? GREAT – you can bring in the rest of it with you tomorrow.”

- *My husband is very busy / he won’t care what you have to say / wouldn’t be interested in coming:*

CA: “I understand, Mrs. Jones. If Dr. Lazar didn’t think it was very important for Mr. Jones to be here, he wouldn’t have told me to schedule a time when he could be here. Would morning or early afternoon work best for the two of you?”

- *My husband is out of town for a couple week / legitimately can't get it:*

CA: "I understand, Mrs. Jones. Dr. Lazar said it was very important for him to be here. Let's do this - I will schedule you for tomorrow and when Mr. Jones gets back, we'll have Dr. Lazar go over your x-rays with him then." (Proceed to schedule.)

- *Why does my husband have to be here? I make my own health decisions.*

CA: "I totally understand, Mrs. Jones - most people do make their own health decisions. Dr. Lazar said he needs to be here simply so he can hear what you've been going through and help us help you, if Dr. Lazar is able to help you. That's all. (SMILE and NOD). So would...[proceed to schedule]."

Second Visit: ROF

As the patient and their spouse enters office, the front desk CA is expecting them, and will stand up, come around the front desk, and greet them warmly by name. This initial moment of bonding is very important as it will set the tone for their first visit. After your greeting turn to the patient:

CA: “Check in with me as you will on each and every visit. Then have a seat. I’m going to prepare a special room for you two to sit down with Dr. Lazar.”

Prepare consultation by having patient x-rays open on x-ray computer. Nasium and AP thoracic are on the left, and lateral cervical and lateral thoracic are on the right. Prepare the Day 2 video. On the clipboard, place (from top to bottom) consultation form, NP intake form, completed folder with scan and doctor’s business card. Below that, have care plan and care credit forms upside down and paper clipped together.

CA: “Mr. & Mrs. _____, your room is ready. Please follow me.”

Lead them down the hall and enter consultation room. Gesture to chairs and say:

CA: “Please make yourself comfortable here, I’m going to show you second video which will explain what the doctor will show you today. When the video is over, he will be right with you.”

Close the door behind you as you leave, place the clipboard face down on the counter that is to the left of the front desk and the timer for 6 min.

At this point, the doctor will give an incredible report and financial. Once the patient accepts care, the staff will be ready to direct the patient to an adjusting room as the doctor leaves the consultation room. The staff will instruct the patient on how to prepare for each adjustment and walk them through that procedure. This will be done with kindness each visit until it is easy and natural for the patient. The doctor will adjust other patients during this time.

CA: “Mrs. Jones, you’ll notice suite numbers above the doors in each suite. Today, you’re going to come into suite 3. When you are sent back to a suite, be sure to close the door, so Dr. Lazar knows you’re in here. Then, empty your pockets, remove your glasses and earrings, and place everything here on this table. Have a seat in this chair and relax so you’re ready for your adjustment. When the doctor walks in the room, he will bring you out in the hallway to get your measurements. Please make sure you are ready when he arrives, and never ever be on your phone.”

The doctor will give the first adjustment, and the financial CA will step in to finish the paperwork,

collect payment for care, and schedule all the patient's visits.

FINANCIAL CA: "Mrs. Jones, I am SO HAPPY to see that Dr. Lazar will be able to help you!!!

****ENTER FINANCIAL CA SCRIPTS HERE*****

SCHEDULING PATIENT AFTER ROF:

Depending on office flow, this may be done by either the financial CA or the front desk CA. Both will be familiar with this procedure. As you are agreeing on a schedule, use a triplicate calendar allowing the entire course of care to be recorded. This is helpful as holidays are pre-printed on the calendar and help to plan ahead. Example: "We are closed on Friday the 25th for Christmas, so you'll come in Monday, Tuesday, and Wednesday that week instead. This way, you'll get all your adjustments that week." The white top copy is given to the patient.

CA: "I'm SO HAPPY to see that Dr. Lazar will be able to help you!! Now let's schedule convenient appointment times for YOU. I see it is necessary for you to be seen daily for the first 5 days and three times a week for the next 24 weeks. Do appointments in the morning or afternoon work best for you? (*Afternoon*) Mrs. Jones to make this easy for you let's schedule all your appointments for the same time each day. Would you prefer earlier or later? (*Later*) 4:30 or 5:00? (*5:00*) Great, we have you scheduled everyday for the first 5 days and MWR for the next 24 weeks at 5:00. The one exception will be Wednesday the 12th when Dr. Lazar asked me to schedule your appointment at 5:45. The orientation will start right after your adjustment. This will save you from having to make two trips that day. Mrs. Jones, if you EVER need to alter your schedule let me know and I will help you. Have a great day! We will see you tomorrow at 5:00!" (give the white copy of the calendar to the patient).

THIRD VISIT SCRIPT AND PROCEDURE

Go into reception area. Hi, Mrs. Jones! I can take you back to your room. Take them into the appropriate room and then explain our regular visit procedure.

“Hi Mrs. Jones! I’m going to go over your daily routine with you. Each day when you come in, please be sure to check in at the front desk. We will then direct you to an adjustment room. There is a suite number above each suite. Today we are going to suite 1. Make sure to close the door so that the doctor will know that you’re here. Empty out your pockets and put your personal belongings on the top of the table here. If you have a jacket you can hang it on the hooks behind the door. The face paper on this table will always be fresh for you, and just come and lay down on this table like this (Show them.) Go ahead and lie down and relax, because the more relaxed you are the better your adjustment will be.”

(Next sit across from them at a 30-degree angle.) “Mrs. Jones I would just like to ask you a few questions. Do you have any questions about our office procedures? Do you have any concerns about your financial arrangements? Are you satisfied with how your appointments are scheduled out? Great!!

When you are done getting adjusted, be sure to wave at me on the way out - but there’s no need for you to stop at the front desk unless you need to change an appointment. The doctor will be with you shortly, if you have any questions, my name is _____, just ask! Thanks