GENERAL CUSTOMER SERVICE TIPS

- ✓ Within 10 feet of the desk we should greet the patient with eye contact and a smile.
  Within 5 feet the patient should be verbally greeted.
- ✓ **DO NOT GET CAUGHT DOING THE FOLLOWING:**

- Leaning on the desk
- Carrying on a personal conversation when a patient may over hear
- Foul Language
- Not recognizing a patient needs help; ignoring a patient because you're busy with something else.

- ✓ **Own the call**: When a patient approaches you or contacts you by phone and has a concern, make it your concern as well. Do not pass the patient onto another department. Make the decision on how you can resolve the issue to the patient's complete satisfaction. If you are uncertain as to a course of action, politely inform the patient you will call him back once you get the necessary information, giving a time frame and making sure you follow through.
- ✓ **Avoid Transferring**: Everyone has made a call to a company and then been passed around like a hot potato. This exemplifies poor training and indecisiveness. When it is appropriate to transfer the call, always ask the patient permission first.
- ✓ **Taking the next logical step**: In order to surpass the expectations of a patient you should always consider if the information you are providing is the best it can be. For example: If a patient asks for directions, offer the patient a map along with written directions and a few key land marks.
- ✓ **Suggestions for Providing Good Service:**

1. Do not make the patient feel that he/she is stealing your valuable time.
2. Do not use slang or medical terms.
3. Avoid such phrases as "hold on", "wait a minute", "yeah".
4. Never act angry, bored, or impolite.
5. Always suggest politely rather than give orders.
6. Never become angry with a patient. It is important to be understanding and helpful.
7. If an unpleasant or abusive situation occurs, excuse yourself and call a manager.
8. Treat all patients in a business-like manner. Do not act too personal.
9. It is important to make each patient feel they are receiving individual service, not a routine.
10. Always be calm under adverse conditions.
11. Make sure you have specific information regarding service, quality, locations, etc. If you do not know, refer them to someone who does or seek the information out for them. It is better not to give out any information, than the wrong information.
12. **Smile! Smile! Smile!**

- ✓ The following will provide you with a list of tips to be used when handling patient complaints:

- Never argue with a patient. Assume the patient is right and work from there.
- Be understanding. Put yourself in the patient's place.
- Don't raise your voice even if it's just to be heard.
- Listen to the whole story without interrupting. The patient always feels they have a legitimate reason to complain.
- Let the patient know you are concerned and sincerely interested.

- Make an effort to determine the cause of the complaint and remain impartial until the problem is clear in your mind.
- If the patient is right, let them know it and make every effort to correct the problem.
- If we are not at fault, <u>politely</u> explain our position to the patient and the reason behind it.
- If you are the least bit uncomfortable explaining our position to the patient, call your manager immediately.
- If the patient is visibly upset, try to take them to an area out of sight and/or earshot of our other patients. Privacy may sometimes have a calming effect.
- Rude and abusive language on your part will not be tolerated but you also should not be subjected to it. If you are the recipient of rude or abusive language, politely excuse yourself and call your supervisor or manager.
- Never admit fault on behalf of the practice for <u>any</u> incident or accident whether it pertains to persons or their belongings.
- If you feel you are unable to assist the patient further and the patient is still angry or dissatisfied, *call a manager and let them handle the situation*. **Never let the patient leave angry or dissatisfied without getting a manager**.

EFFECTIVE TELEPHONE TECHNIQUES

Rate your voice using the following self-evaluation. Check those characteristics that apply to you, and then ask a friend to help evaluate your responses.

DESIRABLE TRAITS	UNDESIRABLE TRAITS
Is pleasant-sounding	conveys a negative attitude
Has pitch variations	sometimes squeaks
Has a normal rate	has a boring monotone
Varies in volume	is too weak
Has distinct articulation	is too loud
Sounds like I am smiling	has too many pauses
Has ample force	does not convey a “smile”
Stresses proper accents	

- ☐ Answer promptly. It is important to answer within <u>**three rings**</u>.
- ☐ Give your immediate attention. Do not carry on “office talk” when the phone is answered.
- ☐ Speak clearly and distinctly into the mouthpiece.
- ☐ Be careful of “company lingo”. Use words that strangers to the company will understand.
- ☐ Never leave the caller holding for any length of time without frequently assuring him that he/she is not forgotten.
- ☐ SMILE WITH YOUR VOICE!

FHA
Customer Service Training Manual

Congratulations

Congratulations and welcome to the FHA. We are glad that you have chosen FHA and hope that you have a long and rewarding career with us. You are working with one of the most successful podiatric practices in Metro Detroit. Its success is due to its employees who consistently go above and beyond the call of duty and exceed our patients' expectations. Patients continue to come back because of people like you. You play a crucial role keeping FHA successful.

There is much to learn about FHA. You may still be learning new things even a year after you start working. This training manual is designed to cover the basics to get you started. It will not answer all your questions, so please ask if you are unsure. We do not want you to second-guess. There is no such thing as a stupid question in our practice. Your training will be a mixture of reading this manual, observing the operation, lectures and outside training. Please bring this manual to work with you for reference during your first few weeks of employment. We do not expect you to remember everything!

We are excited to have you here and look forward to a long and happy relationship. Good luck with your training.

Fact sheet

Address:	Foot Healthcare Associates 3 locations (Livonia, Novi, & Southfield)
Locations:	

37595 Seven Mile Rd, Suite 370
Livonia, MI 48152

26850 Providence Pkwy, Suite 502
Novi, MI 48374

29829 Telegraph Rd, Suite 100
Southfield, MI 48034

Phone:	248-258-0001
Fax:	248-258-6779
Open Since:	July 1984
Property size:	9 clinical exam rooms, 1 casting room

Our Team

The Management consists of the following Doctors and Managers. Together they make the major decisions concerning the institute. They are as follows:

President:	**Dr. Neal Mozen**
Chief Operating Officer:	**Joshua Fenn**
Business Consul:	**Mark LeBlanc**
Human Resources Manager:	**Sandy Mozen**
Clinical/Front Desk Manager:	**Sonja Gerald**
Billing Managers:	**Audrey Beecherl** **Sandra Ratliff**

FHA Service Mission Statement

Our practice at Foot HealthCare Associates is founded on three basic principles: trust, caring and a commitment to excellence in podiatry. We view each patient as an individual. We take the time to get to know our patients and fully educate them on the nature of their particular foot condition. We believe it is important to discuss all treatment options available.

Together we will, enthusiastically strive to professionally provide friendly, efficient service to our patients and each other while we are creating lasting memories and exceeding our patients'
Expectations.

DEPARTMENTAL ORIENTATION CHECKLIST

EMPLOYEE:__________________________ HIRE DATE:______________

DEPARTMENT:_______________________ SOC. SEC.#:_____________

PLEASE RETURN TO COO

Mission Statement: To enthusiastically provide a caring and growing environment where we find pride in consistently surpassing the expectations of our patients and ourselves.

I. Introduction

___ Department Heads and Assistants
___ Fellow Employees

II. Attitude

___ Concern for Patient Satisfaction
___ Working as a team player
___ Flexibility
___ Complaint procedure

III. Work Habits

___ Departmental safety practices
___ Accident reporting procedures
___ Hazardous Chemical Communication Program
___ Smoking/Gum chewing
___ Emergency procedures

IV. Other

___ Employee Entrance location
___ Departmental sign-in/sign-out procedure
___ Paydays
___ Schedule of work and location
___ Overtime policy
___ Performance evaluations and salary increases
___ Location of Changing area and restrooms/procedure for storing personal effects.
___ Uniform procedures
___ Name tags
___ Meal privileges: location, break times.
___ Location and explanation of departmental bulletin boards.

V. TOUR

___ Departmental tour and overview of supplies.

The information on this checklist has been explained to me and fully understood.

__________________________________ __________________________________
Signature of Dept. Head and Date Signature of Employee and Date

MANAGER'S CHECKLIST

___ Add to attendance log
___ Update phone list
___ Establish Computer Codes

General FHA Essentials and tips

Please find below some of essentials and tips to assure excellent patient service.

****** 10-5 Step Rule ******
The 10-5 step rule is something we should practice at all times. This is our way of acknowledging our patient as soon as possible and a way to keep our "heads up"!
The rule is as follows:
Within 10 feet of the desk we should greet the patient with eye contact and a smile.
Within 5 feet the patient should be verbally greeted.

General Manners
The following is a list of "slips" that can make our departments look sloppy.

- Leaning on the desk
- Carrying on a personal conversation when a patient may over hear
- Foul Language
- Not recognizing a patient needs help; ignoring a patient because you're busy with something else.

FHA ESSENTIALS

APPEARANCES: All employees are required to maintain certain basic grooming and dress standards while at work. Males and females should both wear conservative hairstyles. Make-up for females should also be worn in a conservative manner. Nail polish is allowed in neutral or conservative colors. Men's sideburns should not exceed one half the length of his ear and should be clean-shaven every day. Each employee will be issued a Lab Coat. It is your responsibility to keep it clean and presentable at all times.

DO'S & DON'TS: While at your workstation, employees need to realize they are in view of all persons in the lobby. It is important that you act professionally at all times. Employees should stand straight and not slouch, or congregate with other employees. When a patient approaches you should smile, maintain eye contact and speak in a clear and friendly tone of voice. Remember that the patient is the reason we are here and our willingness to assist them is reflective of our presentation at work.

CLEAN WORK AREA: The importance of maintaining your work area in a neat and professional manner cannot be over emphasized. The patient will form an impression because of the overall appearance of the desk counter and work areas. Under no circumstances should personal items be left in view. Nor should any non-essential materials be brought to the work area (i.e. newspapers, schoolwork). Anytime the workday permits, you should assist in maintaining the appearance of the area by wiping down the counters or vacuuming the floor. Again, a team effort is needed to keep the area looking spotless.

SMILE: Nothing could be more important. A smile tells our patients that you are happy and anxious to serve them. It makes them feel at ease, and is a welcome sight after a long and tiring trip. Along with a proper uniform, it is the most important part your appearance.

PLEASANT GREETING: "Welcome to the FHA", or "Hello, how are you today?" are the type of friendly and cordial welcomes one expects to hear as they approach the desk or are being greeted in the exam room. Never initiate a conversation with a patient in the form of a question.

QUICK RECOGNITION: We realize that it will not always be possible to recognize each and every patient at the instant they step up to the desk, verbally. Regardless of the situation, whether it is that you are on a phone call, or entering information into the computer, an acknowledgment of the patient's presence is the courteous and polite thing to do. Making eye contact and smiling with a nod or gesture is sufficient, and much appreciated.

BODY LANGUAGE: Studies show us that people perceive the way they are treated by much more than stimulus than just basic conversation. People read non-verbal signals you are sending in the way you stand or gesture, as well as voice inflections and facial expressions.

DO NOT CONGREGATE: The workload will allow for slow periods, and the tendency during these times, is for staff to gather in small groups and make small talk. No one is opposed to conversation, but to do so in small groups gives the wrong impression to the patient whom is approaching or leaving.

EYE CONTACT: We all agree that a certain amount of looking down to the computer screen is necessary to input information into the computer correctly. However, direct eye contact is the best way to acknowledge the patient's presence and set the appropriate tone for your conversation.

USING THE PATIENT'S NAME: The patient's name is one of the basic items we need to incorporate into any patient situation whether it be checking in, out, or simply asking a question. It has been said that nothing is sweeter to a person's ears than to address him/her by name and by doing so you demonstrate a high degree of professionalism.

USE THE CORRECT GRAMMAR: We should refrain from using slang or incorrect grammar at all times in the presence of the patient. Additionally, the Medical business has created a jargon all it's own and one that can baffle patient if you attempt to use it with them. Words such as "EOB" and "HCFA" fall into the category of Medical jargon.

TONE OF VOICE: The manner in which you speak tells the patient something, much in the way body language does. Please keep your voice level audible, clear, and friendly at all times. There may be times when the patient you are assisting may make this a real challenge. Remember, although they may be upset you should never take this personally. By reacting to an upset patient, you may end up adding to the situation, which could best be handled by remaining calm, friendly, and empathetic.

TELEPHONE ETIQUETTE: It is important that all employees project the correct image while using the telephones. The proper answer: "Good (Time of Day), ………, this is (Name), How may I help you Mr. Jones" is vital. Equally important is to answer the phones within three rings, and to all shares in the responsibility of answering telephones. It is not impolite to ask a patient you are assisting on the phone to hold while you pick-up a call. They realize the phone is ringing and it is probably an annoyance to them as well. Finally, before asking anyone to wait on hold, ask for permission, and only do so when necessary. If you are already with a patient use "Good (Time of day), this is (Name), may I ask you to hold for one moment."

KNOW YOUR PRODUCT: There is a lot of information to be learned, and especially when you are new, it can be intimidating. Learning the facts that are pertinent to your position will be an ongoing process. We suggest that you make notes as to where information relevant to the practice is located, so that when you need to retrieve the information, you will know right where to go. Remember, if there is something you do not know, please make every effort to find the information yourself. This personal touch will not go unnoticed by the patient.

FOLLOW THROUGH: Also known as taking the extra step. Should patient need assistance; it is vital that you take an active role in seeing the request to a conclusion. If the problem requires research or additional information, inform the patients you will call them back, giving a time frame. Find the facts needed, and follow through with the call! If you are not able to retrieve the correct information within the designated time frame, call the patient back, let them know the status and ask for addition time. DO NOT LEAVE YOUR SHIFT UNTIL OUTSTANDING ISSUES HAVE BEEN RESOLVED OR YOU HAVE PASSED THEM ON TO A COLLEAGUE.

NEVER SAY NO: We will do everything in our power to satisfy and please our patients. However, sometimes despite our best efforts, this will not be possible. Should you run into the situation in which you know the patient has requested something we cannot provide, under any circumstances, should you inform the patient "we can not, we do not, or we will not". As an employee, these words should be stricken from your vocabulary. The correct solution in these situations when all options have been exhausted is to excuse yourself and get your manager involved.

Its OK TO MAKE A DECISION: This is where the word "empowerment" comes in. As FHA employees, you are encouraged to resolve potential problems without involving a supervisor. Evaluate the situation, consider your options, think of alternative solutions, and act accordingly. If you feel uncomfortable or unsure of the direction of your decision please get a supervisor or a doctor involved.

EMPATHIZE AND SHOW YOUR CONCERN: Please recognize and react to a patient who is having a problem. No one wants to be treated as just another face. Our philosophy has always been to treat our patient's, as we would like to be treated. In showing a genuine concern for the patient's dilemma you are demonstrating the "I care" philosophy for which FHA employees have long been recognized.

THANK YOU: Along with the use of their name, a "thank you" is probably the most important thing you can say to a patient. An example of this appreciation would be: "Thank you, Ms. Gill, for visiting us. Have a nice day."

PHONE CALLS: In the event of an emergency, a phone call is permitted, and you will be allowed to step off to tend to the matter. Should you wish to place an outside call, you may do so while on break. PERSONAL PHONE CALLS ARE NOT ALLOWED AT YOUR WORK AREA FOR ANY REASON!

GUM CHEWING/CANDY: Gum and candy are not permitted while working at the FHA area or in any public area in the Institute.

CONFIDENTIAL MATTERS: Please do not discuss FHA, or confidential matters with unauthorized personnel, especially in the public areas of the FHA.

SOLICITATIONS: Fund raising, selling of tickets or merchandise is not allowed unless you have the specific approval from the C.O.O.

LOST AND FOUND: All lost articles should be immediately turned over to the FHA Front Desk Manager. Valuables are given to the FHA Manager so they may be properly secured. Articles that remain unclaimed after thirty days are returned to the finder.

REQUESTED DAYS OFF: A request off form is located in your department. We cannot guarantee that you will receive the day off you requested, however, every effort will be made to accommodate you. There is a system for priority based on how long you have been working, seniority. See your manager for details.

ATTENDANCE AND PUNCTUALITY: Attendance is vital to the success of our operation. It is imperative that all employees' report to work on time and as scheduled. This means in the office and ready to work at your scheduled working time. If circumstances prevent you from being on time, a phone call is expected as far in advance as possible. Tardiness and absenteeism cannot be tolerated, and will be documented as to the policies set forth in the employee handbook.

DEPARTMENTAL MEETINGS: Departmental meetings are held monthly. They are a chance for us to meet as a department and discus procedures, changes, and patient comments as well as having some fun learning about the FHA and one another. Continuous training will be part of these meetings as well. Everyone should attend.

GENERAL PATIENT TIPS

- Remember that attacks are not personal, the patient is not angry with you personally, just angry at the situation. Ignore the way the complaint is made. Find out the problem and what needs to be done about it.
- Admit mistakes when they happen. Everyone can understand a simple mistake; when it is not correctly addressed is when it becomes a problem. Do not admit to anything that is the FHA or employee's fault or it could cause legal problems. In cases like this, just apologize that it happened - regardless of whose fault it is. Often an apology is all the patient wants. A simple, "I'm sorry that happened to you", may be all that is needed.
- When you apologize, leave the door open for the patient to come back. Instead of writing off the business, let them know you are sorry it occurred and hope that they will return. "Mr. Jones, I'm sorry that happened; I hope you will give us the chance to make it up to you soon".
- Take personal responsibility. It always makes the patient more comfortable to know whom they are dealing with, and that someone is going to personally take care of the problem. "Mr. Smith, I know this problem with your appointment is upsetting. My name is Chris and I will call the doctor to see if we can take care of it". Then DO IT & FOLLOW UP!!
- Do not use words the patient will not understand if they are not in the medical industry. They will not be able to understand you and may get frustrated, because they do not understand the language.
- Always thank the patient for letting you know of a problem. Remind them they are doing us a favor by letting us know.
- Take the patient seriously. What may seem like the least of your concerns may be the most important concern the patient may have at the time. Always remember that we are here to assist the patient.
- Follow through with anything you promise a patient, no matter how busy you are. If you tell yourself you will get to it when things slow down, most likely you will forget it, or it will be too late. The minute you are free, take care of the issue you committed to.

Service

“To enthusiastically provide a growing, caring environment where we find pride in consistently surpassing the expectations of patients and ourselves.”

This is our mission statement. It is the basis on which FHA operates all of its In an environment where medical practices are similar in providing the newest technological features and physical amenities, it will be the level of patient satisfaction based on service, which will distinguish the successful company from the ordinary. Included below are time-tested suggestions on providing exceptional service:

- Own the call: When a patient approaches you or contacts you by phone and has a concern, make it your concern as well. Do not pass the patient onto another department. Make the decision on how you can resolve the issue to the patient’s complete satisfaction. If you are uncertain as to a course of action, politely inform the patient you will call him back once you get the necessary information, giving a time frame and making sure you follow through.

- Avoid Transferring: Everyone has made a call to a company and then been passed around like a hot potato. This exemplifies poor training and indecisiveness. When it is appropriate to transfer the call, always ask the patient permission first.

- Taking the next logical step: In order to surpass the expectations of a patient you should always consider if the information you are providing is the best it can be. For example: If a patient asks for directions, offer the patient a map along with written directions and a few key land marks.

- Utilize the Front Office Manager: At times during the evening when a specific department is closed (i.e. Billing), it may be difficult to assist a patient by going directly to the department yourself. Collect all information possible from the patient and assure him/her you will follow-up, and make sure that you do. The FOM can also help when departments are unavailable and further follow-up is necessary. The FOM is the best person to handle patient concerns pertaining to any department in the FHA.

PRINCIPLES OF GOOD SERVICE

What makes the difference between a GOOD Practice and a GREAT Practice? The Doctor can certainly mean something, **but the difference is the way we take care of our patients.**

How do we provide good service? To follow are a few simple steps that have proven to work.

- Prompt Attention: This involves recognizing the patient immediately with a greeting and a smile

- (10-5 step rule). Even if you are busy, recognize the patient and make sure he/she knows you will be with them as soon as possible.

- Attitude: A good attitude means you will go out of your way to meet a patient's needs. Don't forget the patient is our real employer. It is important to remember that the patient does not know you have been busy all day. Each patient deserves your full attention and skill, no matter how busy you are.

- Streamline Procedures: Since we cannot have a rule or regulation for every situation, do not let our procedures make a patient uncomfortable. Always try to handle a patient's needs as quickly and efficiently as possible.

- Extended Service: Do not leave a patient unattended. If other departments are busy, try to help the patient yourself. Try to anticipate the needs of our patient and react accordingly.

Suggestions for Providing Good Service:

1. Do not make the patient feel that he/she is stealing your valuable time.
2. Do not use slang or medical terms.
3. Avoid such phrases as "hold on", "wait a minute", "yeah".
4. Never act angry, bored, or impolite.
5. Always suggest politely rather than give orders.
6. Never become angry with a patient. It is important to be understanding and helpful.
7. If an unpleasant or abusive situation occurs, excuse yourself and call a manager.
8. Treat all patients in a business-like manner. Do not act too personal.
9. It is important to make each patient feel they are receiving individual service, not a routine.
10. Always be calm under adverse conditions.
11. Make sure you have specific information regarding service, quality, locations, etc. If you do not know, refer them to someone who does or seek the information out for them. It is better not to give out any information, than the wrong information.
12. Smile! Smile! Smile!

When someone inquires about:

1. Patient Names - We NEVER give out a patient's name to anyone!

2. Confirmation of Appointment-Unless same day, Billing handles prior billing inquiries.

Patient Courtesy and Security

Courtesy... When our patients leave FHA, they will not only remember their experience but the type of service they received from you. Consider every patient who visits us the most important person in the world!! How we treat them, care for their safety, and anticipate every need will be the determining factor of our success.

Security... Never give out information about a FHA patient and be especially careful about divulging names. As an employee, you are in a position to observe the personal lives of many people. It is imperative that you refrain from discussing anything personal about one of our patients, within or outside FHA. You are in a position of trust, do not betray it.

If the media approaches you, please do not give out any information regarding patients, the FHA, or anything to do with FHA. Please refer all inquires to the C.O.O. or Dr. Weil Sr.

Patient Complaints

There are many reasons why a patient may complain. Often we may never know why the problem occurred, but by the time the patient reaches us, it might be the "last straw".

Our job is to make things as pleasant and comfortable as possible for our patients. We don't want to give our patients any reason to complain. When complaints occur, always remember that the patient may have a perfectly good reason to be upset. Do you're very best to be understanding, sincere and patient. Chances are that the patient will calm down if treated with care. The ability to calm an upset patient is a talent and it can be developed.

The following will provide you with a list of tips to be used when handling patient complaints.

- Never argue with a patient. Assume the patient is right and work from there.
- Be understanding. Put yourself in the patient's place.
- Don't raise your voice even if it's just to be heard.
- Listen to the whole story without interrupting. The patient always feels they have a legitimate reason to complain.
- Let the patient know you are concerned and sincerely interested.
- Make an effort to determine the cause of the complaint and remain impartial until the problem is clear in your mind.
- If the patient is right, let them know it and make every effort to correct the problem.
- If we are not at fault, <u>politely</u> explain our position to the patient and the reason behind it.
- If you are the least bit uncomfortable explaining our position to the patient, call your manager immediately.
- If the patient is visibly upset, try to take them to an area out of sight and/or earshot of our other patients. Privacy may sometimes have a calming effect.
- Rude and abusive language on your part will not be tolerated but you also should not be subjected to it. If you are the recipient of rude or abusive language, politely excuse yourself and call your supervisor or manager.
- Never admit fault on behalf of FHA for <u>any</u> incident or accident whether it pertains to persons or their belongings.
- If you feel you are unable to assist the patient further and the patient is still angry or dissatisfied, call a manager and let them handle the situation. Never let the patient leave angry or dissatisfied without getting a manager.

Patient Satisfaction Recovery

Mistakes are a critical part of every service. As hard as we try, we can't prevent the occasional billing problem, or missed appointment. The fact is, in services, often performed in the patient's presence, errors are inevitable.

But dissatisfied patients are not. While we may not be able to prevent all problems, we can learn to recover from them. A good recovery can turn angry, frustrated patients into loyal ones. It can, if fact, create more goodwill than if things had gone smoothly in the first place.

Opportunities for service recovery abound. Any problem that employees who are close to the patient can discover and resolve is a chance to go beyond the call of duty and win a patient for life. We're talking about mistaken billings and late appointments; the seemingly small issues can ignite a person's temper.

It's tempting to dismiss the occasional problem as petty and complaining patients as cranks, but we should resist those easy outs. No business can afford to lose patients. Operations who alienate and frustrate their patients will soon have no one left to bother them. Those that go out of their way to please patients will soon have many more.

You are responsible for Total Patient Satisfaction. Responsibility is the obligation to act, not just to accept blame. Responsibility goes one step further. It says that you are supposed to recognize and attend to patient's needs. As FHA employees, you are empowered to do anything to keep patients happy, using your power to satisfy patient on the spot without hassle, assisting in finding the ultimate cause for patients' problems, and informing managers of ways to improve the overall FHA, working conditions, or patients' comfort.

Problem Solving Process

Problems are not always easy to deal with, but using the steps in this process makes it easier to get to a solution.

STEP 1 IDENTIFYING or recognizing there is a problem and what that problem is exactly. Isolate it!

STEP 2 APOLOGIZE, APOLOGIZE, APOLOGIZE!

STEP 3 ANALYZING THE PROBLEM. After identifying the problem and isolating it, say to the patient “now let me see if I understand you correctly.” (Repeat problem to the patient)

STEP 4 GENERATE POTENTIAL SOLUTIONS. Offer the patient a choice (if possible) of things that my help. Then, let them make the choice. (Verify the solution) “If I/we do this for you, will that solve the problem?”

STEP 5 SELECTING AND PLANNING A SOLUTION. After you or the patient have come to an agreed upon solution, tell the patient exactly what your plan is. “Okay, I will do that for you right away.”

STEP 6 “JUST DO IT!”

STEP 7 EVALUATING THE SOLUTION (follow up). Contact the patient to make sure he or she feels that we did everything we could. “I hope everything has been worked out for you?” “I’m glad I/we could help.”

Review with your Manager or Supervisor the problem and solution and evaluate its effectiveness.

WHAT DOES EVERYONE DO?

The following is a summary of the different areas of the FHA and what everyone is responsible for.

The Front Desk

The main areas of Front desk duties are check-in and checkout. The Front desk fills all appointments and handles all inquiries from our patients. The Front desk also works closely with the clinical staff to maintain an even flow regarding appointments and handling doctor’s needs. The Front desk staff, on occasion, is the only employees with whom a patient will have direct contact and therefore play a critical role in the success of FHA. With each patient that you have contact with, it is possible you may be their only impression of FHA. Therefore, it is important you know as much about the FHA and it’s facilities as possible in order to answer any question patients may ask.

Clinical

The clinical staff greats our patients. They help the patient to the examination room; fill out necessary paper work, and run needed tests for the doctors. The clinical staff spends the most time with our patients and has the opportunity to develop a great relationship with the patient. The clinical staff needs to be professional but also upbeat with our patient to allow them the best experience possible.

Billing

It is the responsibility of the Billing Department to oversee each transaction of money within FHA. You will become very familiar with the people in the Billing Department, for they are the people who audit all work.

To handle all the different aspects of accounting within the FHA, the department is broken down into several different areas. Posters control all information that is submitted to the clearinghouse and to the insurance company. The posters also follow up with all insurance companies that deny claims and then resubmit them after they are fixed. The Accounts receivable person works with insurance companies and patients when they are not able to agree on paying our fees. Accounts Payable person pays all the bills and handles payroll. The Billing Manager oversees these areas.

Comment Cards

On occasion, the patient will bring to your attention a matter, which may have been a concern to them. Again, use **H.E.A.T.** to resolve the issue and if the situation warrants it, have the patient fill out a comment card. You may then pass this comment card to the C.O.O. FHA associates are not authorized to open sealed comment cards, as there may be negative information inside regarding named employees.

A patient may also relay a positive comment about service or an individual. Please ask the patient if they have the time to complete a comment card about their experience. This allows us to acknowledge the employee or department involved and say thank you. We are proud of positive comments and they should be heard whenever possible. A copy of all FHA positive comment cards will be kept on the individual's Personnel file.

TAKING THE HEAT
You will hear this mentioned many times during your FHA initial and ongoing training. Taking the H.E.A.T stands for:
Hear them out
Empathize
Apologize
Take action

If you can remember this when dealing with a complaint, you will be well prepared to deal with almost any situation:

Hear them out: Patients have many times have pre-planned what they want to say. It is important to them that they are allowed to finish their "speech" and to not be interrupted. As before, use this waiting time to prepare your answers.

Empathize: The patient needs to know that we understand how their inconvenience was frustrating. "I certainly understand how having to wait 45 minutes for an appointment was frustrating Mr. Smith". Let them know you would find that annoying too.

Apologize: Often all they are looking for. It is crucial that you get this word in somewhere. Even for the smallest of inconveniences. If you do a wonderful job but forget this part, all your efforts could be in vain. If they don't hear that word they WILL notice!

Take Action: Let them know that from now on, everything will go smooth for them and YOU are the one who will make sure of that. Experience and / or asking for advice will guide you with what you consider to be appropriate. Watch others dealing with situations to help you learn. Remember, even the most furious of patients is not necessarily interested in compensation, they just want an apology and for it not to happen again. Your bottom line goal: make sure the patient leaves feeling they have been heard and appropriate action has been taken. We want them happy!

EFFECTIVE TELEPHONE TECHNIQUES

Proper telephone technique is essential when answering the phones at FHA. If you handle your calls in the appropriate manner, you will project a positive, knowledgeable image while collecting the proper amount of information to assist our patients.

SIX POINTS TO SUCCESS

BE ALERT: A cheerful, wide-awake greeting sets the tone of any conversation and shows you are ready to help.

BE NATURAL: Use simple language; avoid slang and technical terms.

BE EXPRESSIVE: Speak at a moderate rate and volume, but vary the tone of your voice to add vitality and emphasis to what you say.

BE DISTINCT: Pronounce your words clearly and carefully. Always speak directly into the mouthpiece of your telephone.

BE PLEASANT: Show that you are interested in being helpful. Personalize your conversation by using the person’s name.

BE COURTEOUS: Good telephone habits are nothing more than good manners.

WHEN YOUR TELEPHONE RINGS...

ANSWER PROMPTLY: Try to answer on the first ring if possible: no later than the third. Your alertness gives a positive start to any conversation.

IDENTIFY YOURSELF: Let the caller know with whom he/she is speaking to. This will avoid misunderstandings.

TREAT EVERY CALL AS IMPORTANT: Never treat any call as routine. Personal consideration for the caller builds confidence in you and your company.

OFFER A PLEASANT GREETING: Opening a conversation by saying, “Good Morning” or by adding “How may I help you?” shows that you intend to be courteous.

TAKE TIME FOR A GOOD ENDING: Always thank the caller for calling and offer a simple “Good-bye”. Let the caller hang up first, and then replace your handset.

USE COMMON COURTESY WORDS: “Please,” “Thank you,” and “You’re Welcome,” is positive and powerful words that build a reputation for you and your company.

USE THE PATIENT’S NAME: There's no sweeter music to a person’s ears than the sound of their own name. This is absolutely compulsory.

BE A GOOD LISTENER: Give the caller your undivided attention. Never make callers feel as if they are stealing your time.

WHEN THE CALLER NEEDS INFORMATION

BE HELPFUL: Offer what information you can. If you must leave the phone to obtain information, explain why you need to do so. Before you put a caller on hold, always ask for permission to do so.

THANK THE CALLER FOR HOLDING: Show appreciation for the caller's patience. Use a phrase such as, "Thank you for holding."

NEVER LEAVE A CALL HANGING: Be sure to give progress reports every 20-30 seconds to assure the caller that you are working on the request.

BE TACTFUL: If a company policy prohibits giving the requested information over the telephone, give a straight forward, but empathetic explanation.

WHEN YOU MUST TRANSFER A CALL...

EXPLAIN YOURSELF: On the occasion when you must transfer an incoming call, it is polite to explain what you are doing.

WHEN ANSWERING FOR SOMEONE ELSE...

ANSWERING FOR CO-WORKERS: Always identify yourself. Tell the caller approximately when you expect your co-worker to return, or whether the person can be reached elsewhere.

BE DISCREET: The wrong impression can be created with statements such as "He's still on his coffee break," or "I don't think she's come in yet." The professional image of our entire company is at stake.

Voice Quality
We all have voices that sound different. Some of us have the deep voice of authority, while others of us sound meek or frail. Voices can be pleasant or annoying, easy to decipher or unintelligible, clear as a bell or squeaky. The voice you project is determined by four factors, all of which can be controlled.

ENERGY-The energy in your voice reflects your attitude and enthusiasm.

RATE OF SPEECH-A normal rate is 125 words a minute. Speaking faster can create problems.

PITCH-This can be monotone, a low or a high pitch. Ideally you should vary your time and inflection.

QUALITY-The above three factors make up their voice quality.

PUT A SMILE INTO YOUR VOICE!!

It is easy to do. Simply remember to smile as you answer a call. Believe it or not, your voice will sound friendlier.

Your voice reflects your personality. If it needs improvement, you can do it, but you must be willing to try. Practicing voice techniques is no different than practicing a sport. If you stay at it, you are bound to improve.

Rate your voice using the following self-evaluation. Check those characteristics that apply to you, and then ask a friend to help evaluate your responses.

DESIRABLE TRAITS	**UNDESIRABLE TRAITS**
Is pleasant-sounding	conveys a negative attitude
Has pitch variations	sometimes squeaks
Has a normal rate	is a boring monotone
Varies in volume	is too weak
Has distinct articulation	is too loud
Sounds like I am smiling	has too many pauses
Has ample force	does not convey a “smile”
Stresses proper accents	

<u>Telephone Etiquette</u>

Answer promptly. It is important to answer within **<u>three rings</u>**.

Give your immediate attention. Do not carry on "office talk" when the phone is answered.

Speak clearly and distinctly into the mouthpiece.

Be careful of "company lingo". Use words that strangers to the company will understand.

Never leave the caller holding for any length of time without frequently assuring him that he/she is not forgotten.

SMILE WITH YOUR VOICE!

Using the telephone properly is an important part of your job. Good manners, a pleasant voice and good direction will make your job easier. Good communication skills are a must and the one rule of thumb is "when you say it with a smile on your face, it puts a smile in your voice".

The standard for answering the telephone at FHA is as follows:
Greeting - "Good Morning" (time of day)
Identify our department - "FHA"
Identify yourself - "This is John."
Offer assistance - "How may I help you"

<u>Telephone Technique: Managing</u>

Different Caller Behaviors

Every caller is different. Experienced patient service providers learn to recognize these differences and adjust their responses accordingly in order to provide better service.

Let's look at four different types of caller behavior often heard on the telephone.

<u>CALLER BEHAVIOR PATTERNS</u>
1. Assertive/demanding
2. Angry
3. Passive
4. Talkative

MANAGING THE CONVERSATION WITH AN ASSERTIVE/DEMANDING PATIENT

Assertive/demanding people are pretty easy to recognize the telephone because they are quick to show authority, demand action and usually get to the point immediately. There is seldom any mystery as to what they want because they make it clear. They spend little time with social or other non-business conversation. Their calls will generally be shorter than most because they want to get business taken care of. Does this mean they are upset or angry? No. However, it is easy to mistake their assertiveness for anger, especially if you fail to listen closely.

When dealing with demanding patient on the telephone you may need to raise your assertiveness level to simply manage the conversation.

How to raise your assertiveness level.

1. If your voice is soft raise it slightly.
2. Be direct and to the point in your statements.
3. Keep the non-business conversation to a minimum.

A word of caution: Keep your assertiveness level just below the callers. Matching the patient's assertiveness could produce an argument.

A final point; do not be offended by a lack of rapport with this type of patient. Remember, they are interested in the business side not the social or relationship side of business.

SUMMARY: HOW TO RESPOND TO AN ASSERTIVE/DEMANDING CALLER

1. Listen so that you will understand the problem or request.
2. Match some of the patient's assertiveness.
3. Use closed questions to help control the conversation.
4. Be friendly, but specific and direct in you're statements.
5. Remain courteous.

Managing the Angry Caller

Angry patients are a challenge even to the most experienced patient service provider. The task can be difficult but also very rewarding especially when an angry patient calms down and actually becomes friendly.

When you have telephone contact with an irate patient there are three important techniques that will help you manage the conversation.

1. **LISTEN-**so you will understand the problem or concern
2. **RELATE**-apologize in a general way or in a broad sense.
3. **PROPOSE AN ACTION PLAN-**that will solve the problem.

EXAMPLES: How to Relate
"Mrs. Smiley, I understand how you must feel."

"I'm sorry about the confusion."

"Mr. Welch, I don't blame you for being upset. Let's see if we can correct the problem."

Note that in the above examples the apology is very general. You can always apologize for the situation or the confusion, etc.... without admitting that you or the FHA were wrong. Most patients will find the "general" apology acceptable.

When the patient has a legitimate complaint sometimes it is best to relate by agreeing.

EXAMPLES:
"Mrs. Johnson, you are right. You were promised a callback yesterday and we did not Call. Let's start again and get this problem solved."

When a patient complains, offer your concern that they are upset, but do not take aggressive or hostile comments personally. Often an angry caller will display a lot of emotion. When this happens, do your best to remain calm and avoid getting caught up in the emotion.

Finally, once you have, listen closely and relate it's time to offer an action plan. Make sure your action plan is one you can deliver. The action plan should be stated in clear and concise terms.

EXAMPLES:
"I'll check with accounting and we will call you back with an answer before 4:00 today."

SUMMARY: MANAGING THE ANGRY PATIENT

1. Listen closely so you will understand the problem.
2. Relate by apologizing in a general way or in a broad sense.
3. Propose an action plan and then do it!
4. Stay calm and avoid getting involved in the patient's emotion.
5. Remain courteous

Managing the Talkative Caller

Talkative people are often interesting and enjoyable, but on the telephone they can take up a lot of time. To avoid losing valuable time, a conversation with a talkative patient must be managed. There are three proven techniques that will work for you.

1. Ask closed questions
2. Use space control
3. Provide minimal response

CLOSED QUESTIONS

Use closed questions as often as possible with a talkative caller. The short answers you receive will help move the conversation along. Ask open questions only when you need more explanation.

SPACE CONTROL

Space control sounds exotic but it simply means providing little space between your statements for the talkative patient to interrupt. You can do this and remain courteous without rushing. Between sentences use a shorter pause than normal and then immediately make your next statement or ask a question.

MINIMAL RESPONSE

Do not invite unnecessary conversation. The talkative patient may want to engage you in non-business conversation. To reduce the amount of conversation keep your response to a minimum and always steer the conversation back to business.

MINIMAL RESPONSE EXAMPLES:

PATIENT: How is everything going? Have they been keeping you busy?
FHA: We have been very busy. How may I help you?

PATIENT: Hi, Jenny! This is Mike. How's everything going? Did you get to go to the convention yet?
FHA: Hi, Mike. No I missed the convention but I heard it was great. What can I do for you?

GENERAL FHA STANDARDS

- Patient satisfaction is every employee’s number one priority
- When a patient approaches in any area of the FHA, employees acknowledge and greet the patients by name (if Possible) in a friendly, professional manner.
- Patient interactions are efficient, expedient and personalized by use of employee’s name
- All patient requests for information or services are followed through until patient satisfaction is achieved
- Employees at all levels demonstrate initiative and follow through in satisfying patients
- Employees anticipate patient needs by suggesting or offering services
- Employees make consistent efforts to thank every patient and extend an invitation to return
- When dealing with patient complaints, employees portray an attitude of concern, acknowledge inconvenience and offer alternatives
- Telephone transactions are handled utilizing proper telephone etiquette
- Patients are notified in advance of unavailable services, closed facilities and delayed promises
- Patient feedback is actively solicited through employee interactions and management
- Patient privacy is respected at all times
- All information provided to patients is factual and accurate
- Pricing policies reflect concern for providing patients with value for dollars spent
- Employees are surrounded by a safe and supportive work environment
- Employee input and suggestions are actively encouraged an utilized
- Employees are selected based on adherence to FHA standards and hiring practices
- Employees have completed FHA orientation and received appropriate departmental training prior to having patient contact
- Employees are in proper uniform and meet FHA grooming standards
- Communication systems are provided and frequently updated to keep all employees well informed
- Employee efforts are recognized and rewarded on a consistent regular basis
- Management provides an empowered atmosphere for employees
- All employees are knowledgeable about FHA information, hours of operation, facilities and established guidelines of special program and promotions
- All employees are aware of department procedures and guidelines for ensuring patient satisfaction
- All facilities are equipment are maintained in proper working condition
- Exterior facilities and landscaping are attractively maintained
- Responsibility is taken by all employees to ensure that cleanliness in maintained in all patient and work areas of FHA

Basic Patient Service Skills

Patient Recovery

Staff members at the FHA should strive to provide our patients with the finest possible personal service. Unfortunately as with many businesses, there will be times when service falls short of a patient's expectations. Regardless of the reason for the let down, the staff (you) must find a way to regain the person's trust or "recover" the situation.

Under the FHA Empowerment program, each staff member has the power to do whatever it may take to recover a negative situation. Management will completely back up and support your decisions. The only restriction is, the decisions have to be reasonable.

Nobody really likes to listen to someone complain. In this business, however, it is our responsibility not only to listen to patient complaints, but also to respond in a way that shows our commitment to patient satisfaction. When a patient approaches you with a complaint, use the following steps to recover the situation.

⇒ STEP ONE: LISTEN!

Pay close attention to what the patient is saying. Show that you are listening by using attentive body language (eye contact, open body posture, facial expressions, etc.). When the patient is telling you the areas he/she feels the FHA can improve in, write the concerns down on the red log as you are speaking with the patient. This is a great way to show the patient that you are listening, you care and that you are going to take action.

Listening sends a non-verbal message that you will be the person to take responsibility.

⇒STEP TWO: APOLOGIZE!

Respond to the patient with a sincere apology that identifies with the patient's emotion. (Empathy)

When patients express that they expected more from our service, tell them that we apologize for their disappointment. By using the word disappointment, you are responding to their specific emotion.

When patients state that they did not enjoy the long wait, apologize for the delay and inconvenience and tell them we are sorry for holding up their time.

In some cases, it is necessary to confirm facts or request additional information to understand the complete situation. Use caution when restating information. Your tone of voice should match the voice of the patient (unless the patient has begun to raise his/her voice). If your tone of voice or the expression given to your words does not extend the proper amount of compassion the situation could become much worse.

⇒ STEP THREE: FIX WHAT IS NOT RIGHT!
Assess what is wrong or what is perceived to be wrong and make it right. JUST FIX IT!

When the problem is simple, do not complicate it.

When something has been said or done which cannot be retracted, offer an item or service that is comparable to what should have been done in the first place.

Most patients just want you to make them feel better, not to make the deal of the century. Never assume a patient is trying to take advantage of the FHA. Assume all patients have the best intentions. Tell the patient exactly what you will be doing for them and give them specifics if possible. If you must confer with someone else, give the patient a specific time when you will get back to him or her with the answer. If you are unsure of how to offer assistance, ask the patient directly what you can do to regain their trust and confidence.

⇒ STEP FOUR: FOLLOW UP!
After you have provided the necessary service or services to correct what is not right, it is important to ask patients if they are satisfied with the correction. This can be done in person or by making a telephone call or writing a letter to there or home. A letter or phone call will be made from the C.O.O. or Office Manager.

⇒ STEP FIVE: PREVENT A REPEAT!
Offer a solution or method to your manager that will assure that the situations will never happen again.

Empowerment Tools.
Follow up is an important part of the recovery process. The empowerment tools are to be used by the FHA staff for follow up on complaints that come through the department.

Amenity Apology Forms
Special amenities are available as a thoughtful gesture that can be sent to the home of a dissatisfied patient.

This method of follow-up is appropriate in situations such as the following:
Waiting for an appointment longer than 30 minuets. Cancelled appointments.

"PERFECT VISIT" AMENITY FORM

Date: __06/15/01________

Patient Name: _________Nancy Weil____________ Sent By: _______John Moroney__________

Address: ____

Reason: _______The patient waited 45 minuets to see a doctor_________________________________

____

____

Amenity Requested:
(Choose One) _______Gift Card _______Managemnt letter
Other /Explain: ______________________________________

PLEASE ATTACH THIS FORM TO YOUR COMPLETED NOTE

Make the attached note as specific to the situation as possible. The gesture of the special amenity will seem less personal to the patient if the accompanying note sounds like a generic apology note.

Red Log

The Red log sheets are used to keep the different managers informed of any problems that arise during a patient's visit to the FHA. These are kept at the Front Desk.

Red Book Log Sheet

Date: 06/13/01 Appointment Time: 4:30pm

Patient Name: Steve Weinberg

Address: 23 North Main

City: Champagne State: IL Zip Code: 61356

Phone Number: 815-432-6140 Work # 815-432-5568

Nature of Problem: ______

______

______

Immediate Action Taken: ______

______

Entered By: Tracy Nelson Department: F/O

Manager Action Taken: ______

______

Manager: ______ Date: ______ X: ______

Copies: Dr Weil Sr.
John Moroney

Basic Patient Types

In patient problems solving we have identified five different patient profiles, which often dictates how we handle patient concerns based on the personality displayed. Listed below are the five basic personality types and guidelines on how to handle them on an individual basis.

Type A
This patient comes on strong, insisting that he knows what is wrong and what you should be doing about it. Generally, the most vocal of all complaints, a “venter” of their frustrations.
Tips on how to handle;
* Listen and repeat what you’ve heard.
* Be prepared to respond, get your facts straight
* Question firmly
* Don’t be a “counter-expert” or offer excuses

Type B
This type of person is indecisive and will beat around the bush. Can’t seem to make up their mind. Tips to handle:
* Try to clear up the issue
* Help him/her be a problem solver
* Rank the options
* Give support after the decision is made (“Oh, you made the right choice Mr. Smith”)

Type C
This is someone who is afraid to say what is really on their mind because they don’t want to be considered a troublemaker. Bends easily which makes it difficult to improve the situation to their satisfaction. Tips to handle:
* Let the patient know you value them
* Don’t allow them to make unrealistic commitments
* Tell them you need their input to help you find a solution

Type D
This is the patient who really doesn’t expect you to be able to solve a problem, but wants to file a complaint anyway. Tips to handle:
* Don’t get drawn in
* Get the patient to tell the real reasons for his feelings
* Practice realistic optimism
* Never argue

Type E
For whatever reason, this person is furious with the FHA. They are likely to be loud / abusive / and insistent upon receiving your immediate and undivided attention. Tips to handle:
* Don’t interrupt until they have finished
* Remain calm and think of your responses while they are talking
* Use a low tone; this will help lower their tone
* Focus on the facts
* Apologize and take action. You are empowered

Look at resolving a patient issue as a challenge to be overcome. It may take some time to gain confidence and knowledge in the FHA and product. As long as you remember you are here to do “**whatever it takes”** to get the job done, you have taken the first step in solving any type of problem with which you may be confronted.

Important TIPS and Programs for Patient Recovery

As the person who is out there dealing with patients on a daily basis, you are often better equipped to make a decision in dealing with a concern or patient problem than you realize. You often are the first person to deal with the complaint and therefore have the first chance to correct it. In addition to that, patients whose problems are dealt with by you will be impressed that you dealt with the problem and did not have to get a manager. They do not necessarily want to have to repeat their complaint to a manager (although some patients will insist on this), when you can provide the empathy and compensation they are looking for.

We want you to feel confident about the decision that you make and that you will be supported in your decision. All cases are different and can vary depending upon many circumstances, including the level of unhappiness of the patient. Remember our goal is for them to leave happy.

Experience will help you a lot with what to do in certain situations. Watch your fellow colleagues and use their experience. Above all, remember H.E.A.T., and take OWNERSHIP of these challenges; See the problem through and do not leave your shift without COMMUNICATING to the next shift if necessary.

Tips Tips Tips Tips Tips Tips

Do not make excuses
Patients are not concerned with the details of what went wrong. They only want the problem to be handled as easily and quickly as possible. Making excuses implies a refusal to accept responsibility for the situation. We want our patients to know that we stand behind our claim of "Whatever It Takes."

Avoid playing the "blame game."
Blaming the company or another employee will only reflect the patient's negative opinion back at you. After all, you are part of the company and your co-workers are part of your team. Accepting responsibility does not mean the problem is your fault – it means you are the going to do your best to make sure the patient leaves satisfied in spite of what went wrong.

Never offer something you or FHA cannot do.
Making elaborate promises to a patient can only make the situation worse. Stick to what you know you can deliver. Talk to managers and other staff members about their recovery experiences to get a feel for what is appropriate.

Do not tell patients you will "research their situation" unless it is absolutely necessary.
Regardless of the situation, patients will see this statement as just a ploy to get them off your back. If you need to verify what a patient has told you of if you need to ask for assistance, tell the patient exactly what you are going to do and approximately how much time it will take.

Never let a patient know you have lost control or are unable to handle a particular situation.
Patients need to feel that they are dealing with someone who can actually help them, not someone who appears flustered or confused. Do not be afraid to ask for assistance if you are not sure how to handle the situation.