

	DOCUMENT TYPE: <input checked="" type="checkbox"/> Policy	ORIGIN DATE IN TITLE 21 November 2020
CLIA Lab Director: Name and Credentials of CLIA Lab Director	LAB DEPARTMENT: Central Processing Client Services	CONTACT: Central Processing Management

APPLICABLE LABORATORY(S):

- North Carolina Baptist Hospital (NCBH)
- Lexington Medical Center (LMC)
- Davie Medical Center (DMC)
- Wilkes Medical Center (WMC)
- High Point Medical Center (HPMC)
- Westchester
- Clemmons

PROCEDURE STATEMENT

The purpose of this policy is provide guidelines for phone interactions between departmental staff and customers (anyone calling into the department).

SCOPE

This policy applies to all employees within the departments.

DEFINITIONS

- A. Policy: As defined in the Policy on Creating and Amending Policy, a statement of principle that is developed for the purpose of guiding decisions and activities related to governance, administration, or management of care, treatment, services or other activities of WFBH. A policy may help to ensure compliance with applicable laws and regulations, promote one or more of the missions of WFBH, contain guidelines for governance, and set parameters within which faculty, staff, students, visitors and others are expected to operate.
- B. WFBH Lab System: Wake Forest Baptist Lab System is a health system that includes Wake Forest Baptist Medical Center and all affiliated organizations including Wake Forest University Health Sciences (WFUHS), North Carolina Baptist Hospital (NCBH), Lexington Medical Center (LMC), Davie Medical Center (DMC), Wilkes Medical Center (WMC), High Point Medical Center (HPMC), Lab at Westchester and Lab at Clemmons.

POLICY GUIDELINES

A. General Guidelines for Phone Interactions

1. Determine who is calling and why they are calling to help direct the rest of the conversation. Refer to the attached suggested scripting for some of the more difficult situations.
2. Be aware of the tone of your voice.
 - a. It should communicate that you are friendly, intelligent and happy to speak with the caller.
 - b. Sources say that pretending the caller is in front of you or smiling can make you sound more friendly.
 - c. Remember that the person you are talking to does not know you and will form an opinion based on this conversation.
3. Match your pace and responses to the caller's.
 - a. If the caller is very direct and to the point, then respond with short, concise answers while remaining pleasant and approachable.
 - b. Some speakers may require a slower, more deliberate response and strong articulation. Speaking too quickly may intimidate them even when using a pleasant tone. Repeat back what is said to you to ensure understanding.
4. Be Extra Helpful. Example: You may have trouble hearing a caller but don't blame their phone or signal. Politely say something like: "I apologize! I'm having a little trouble hearing you, do you mind repeating that?"
 - a. The following words are considered powerfully- positive words so use them when you can.
 - Absolutely
 - Certainly
 - Wonderful
 - Delighted
5. Ask Permission to give callers a feeling of being in control of the conversation. Instead of saying "I need your phone number," or "I need to put you on hold." Phrase it as a request: May I have your phone number or May I put you on hold.
6. Show appreciation by saying 'Thank You' as appropriate. This reflects your friendliness and dedication to the caller.
7. Exude confidence. It shows that you know what you are talking about and there is no one better to help them than you.....but you need to be able to follow through. You may not have the answer to every question but reply in a way that you will find the right answer, and then follow through.
8. Make sure you define if there are any next steps for you or your caller.
9. End the call on a positive note. "Thank you for calling."

10. When you are the one making the phone call, the above still apply. When passing along information, confirm that the person receiving the information knows what to do with it – and if not, request that they transfer you to the appropriate person.

REFERENCES

RELATED POLICIES/PROCEDURES (NAVEX)

ATTACHMENTS/LINKED DOCUMENTS (TITLE 21)

Scripting for Client Services

Search in Title 21 for: Release of Laboratory Results to Patients LC-SOP-0034

REVISION DATES: REVIEW CHANGE SUMMARY AS REPRESENTED IN TITLE 21.

SCRIPT

Situation	Script	Comments
Attorney office calls for explanation of result	<i>Let me transfer you to Risk Management for that information.</i>	
Non- employee, non- patient calls regarding treatments they have read about from Innovation quarter.	<p><i>Innovation quarter continues to do some remarkable things. I do have someone you can contact for more information.</i></p> <p><i>Bonnie L Davis, bdavis@wakehealth.edu 336-713-1597.</i></p>	
Sales people from companies we do not currently have contracts with who continue to call managers who have not returned call.	<p><i>I will be glad to take your name and contact information.</i></p> <p><i>I will forward this to the manager if they are interested they will be able to get in touch.</i></p>	
Billing issues	<p>Patient issues: <i>Let me transfer you to the customer service center. If you should accidentally get cut off the number is: 336-716-3988 or 877-938-7497.</i></p>	<p>For itemized statement Bill disputes Overpayment refund</p>
Patients calling about how long drugs stay in their systems....or similar requests.	<i>I would recommend that you contact your physician for this information.</i>	
Delusional parasitosis patients (we get many of these, parasites that disappear when taken to doctor, or are in prosthetic eyeball) these people take up a lot of time and it is difficult to know how to manage their call.	<p><i>I am sure that your physician would want to know this information. Please contact them. Do you have their phone number?</i></p> <p><i>Yes – Good. I am sure they will be able to help you.</i></p> <p><i>No- Let me find that phone number for you. (Locate, give it to them) I am sure they will be able to help you.</i></p>	
Having difficulty understanding caller	<i>I apologize! I'm having a little trouble hearing you, do you mind repeating that?</i>	<p>You may have trouble hearing a caller but don't blame their phone or signal.</p>

Situation	Script	Comments
<p>Patients wanting results or explanation of result. Many want us to look them up to check orders.</p>	<p><u>For results:</u> <i>Yes we can provide those for you but it may take up to 30 days to do so. If you need them faster we recommend that you view them using My Wake Health portal, contact the Medical Records department or contact your provider directly. My Wake Health portal is the fastest way.</i></p> <p>Offer to send them the request form that they can fill out per our SOP.</p> <p><u>For orders/explanation of test:</u> <i>Please contact your provider for this information. They will be able to answer any questions that you may have.</i></p> <p>NOTE: Refer to '<i>Release of laboratory results to patients</i>' (LC-SOP-0034) in Title21 on how to handle the release of results and document retention. A copy of the form that needs to be completed by the requester is a part of that protocol.</p>	<p>LC-SOP_0034 Release of Laboratory Results to Patient</p> <p>The CLIA and Patient Privacy Act changed things in 2014 concerning the release of lab results to patients. Prior to 2014 patients were not considered authorized to obtain test results directly from the lab. That changed and now lab are allowed to provide them to the patient but the way the law is written we have up to 180 days to comply with the request.</p> <p>The main thing we should be sure that our Customer Service folks are aware of when approached with this question – we never tell them, NO the lab can't do it..</p>
<p>Irate physicians</p>	<p><i>I don't think that I am able to help you further. Please contact our Medical Director, Greg Pomper. His beeper number is: 8009.</i></p>	
<p>Requests to change diagnosis codes, etc.</p>	<p><i>I am sorry but we do not have the authority to perform that function in WakeOne.</i></p>	
<p>Requests for reproductive endocrinology (Sperm bank)</p>	<p><i>Let me transfer you to the Wake Forest Center Reproductive Endocrinology. If you should accidentally get cut off the number is: 336-716-6476 or 1-866-WAKEIVF</i></p>	<p><i>During office hours call: 336-716-6476 or 1-866-WAKEIVF</i></p> <p>There is an after hours line to page the doctor. 336-716-2011, Option 7</p>