


## Guidelines for Phone: Scripting

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|  | <b>DOCUMENT TYPE:</b><br>Policy                                  | <b>ORIGIN DATE</b><br>11/14/2020          |
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### 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

### POLICY PURPOSE

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

### SCOPE

This policy applies to central processing and client services team members.

### 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.

## B. Result Inquiry or Specimen Status Calls

1. When receiving calls to inquire the status of hematology results (for example, CBC, coag, UA):

- a. Look in Specimen Inquiry to see if the specimen has been received. If the specimen has been received in Winston Lab for over 15 minutes: transfer the call to the hematology bench at 2-8770.
2. When the caller inquires on the status of a specimen and it has NOT been received in Winston Lab:
- a. Look in Specimen Inquiry to see if we received other specimens on the same patient collected at the same time.
  - b. If we have received another specimen from the same collection, ask the caller for a callback number to allow you time to investigate. Print the label of the missing specimen and check with a hematology or chemistry tech to see if the missing specimen has been on the track at all.
  - c. Check centrifuges, floors, around workstations, balance racks, and tube station for any dropped or misplaced specimen. Check discard bin for urine specimens.
  - d. If it is a missing chemistry specimen – ask the caller if the specimen was drawn in a pediatric bullet tube. If the tube is a bullet, check with chemistry to see if the specimen is in their area and we didn't scan in lab.
  - e. If we have checked all areas with no results, then inform the caller that the specimen has not been received.

**LITERATURE REFERENCES:**

None

**RELATED POLICIES/PROCEDURES IN NAVEX:**

None

**ATTACHMENTS/LINKED DOCUMENTS IN TITLE 21:**

Scripting for Client Services

Release of Laboratory Results to Patients

**REVISION DATES:**

8/29/24: Added section B: Result Inquiry or Specimen Status Calls

Manager review (sign/date): *Joni McHone 8-29-24*

Medical Director approval (sign/date): *CR 9/4/24*