

## TRAINING UPDATE

**Lab Location:** GEC, SGMC & WAH  
**Department:** All staff

**Date Distributed:** 1/20/2017  
**Due Date:** 2/14/2017  
**Implementation:** 2/14/2017

### DESCRIPTION OF PROCEDURE REVISION

**Name of procedure:**

**Telephone Courtesy Standards      SGAH.L32 v3**

**Note:** this has been converted to a system SOP

**Description of change(s):**

Section 5: add reference to App A, edit script for answering phones

Section 6: remove Call Handling SOP

Section 9: add appendix (*info came from current Call Handling SOP, which is being retired*)

**The revised SOP will be implemented on February 14, 2017**

**Document your compliance with this training update by taking the quiz in the MTS system.**

Non-Technical SOP

<b>Title</b>	<b>Telephone Courtesy Standards</b>	
<b>Prepared by</b>	Leslie Barrett	Date: 5/18/2009
<b>Owner</b>	Robert SanLuis	Date: 6/3/2010

<b>Laboratory Approval</b>		
<b>Print Name and Title</b>	<b>Signature</b>	<b>Date</b>
<i>Refer to the electronic signature page for approval and approval dates.</i>		
Local Issue Date:		Local Effective Date:

<b>Review:</b>		
<b>Print Name</b>	<b>Signature</b>	<b>Date</b>

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### **1. PURPOSE**

To ensure all telephone calls are handled in a manner consistent with quality customer service.

### **2. SCOPE**

All Laboratory employees are required to utilize telephones in a manner that provides quality service and complies with HIPAA standards.

### **3. RESPONSIBILITY**

All Laboratory employees must comply with this procedure.

### **4. DEFINITIONS**

None

### **5. PROCEDURE**

1. All calls will be answered within **three rings**. Use the following guidelines:
  - DO answer the phone. It is everyone's responsibility to answer the phone. It is critical for patient and physician satisfaction. It is also necessary for employee satisfaction as we grade each other on our teamwork.
  - DO put a smile in your voice when you are on the phone.
  - DO use the caller's name when speaking to them on the phone.
  - DON'T use the speakerphone feature to answer the phone.
  - DON'T assume you know who is calling based on the phone number on the display. It could be anyone.
  - [Refer to appendix A for techniques and expectations](#)

2. The phone will be answered as follows:  
~~Good morning, Good afternoon, Good evening (select appropriate to time)~~  
~~This is \_\_\_\_\_ in the Laboratory. How may I help you?~~  
~~(State your name)~~  
**For internal calls (single-rings):**  
Thank you for calling the laboratory. This is \_\_\_\_\_. How may I help you?"  
*State your name*  
**For external calls (double-rings):**  
Thank you for calling Adventist Healthcare \_\_\_\_\_ (hospital) laboratory.  
This is \_\_\_\_\_. How may I help you?"  
~~**Note:** If the call is from outside the facility, include the facility name when answering.~~
3. End all calls as follows:  
When you are finished ask "Is there anything else that I can do for you?"  
Say "Good bye" before you hang up the phone.
4. If more than one line is ringing at a time, perform the following:
  - a. Ask the caller if you can put them on hold for a moment. LISTEN for their answer and thank them for holding.
  - b. Answer the second call and ask the caller if you can put that person on hold for a moment. Again, listen for their answer and thank them.
  - c. Go back to the first call.
  - d. When going back to the first call, say to the caller, "I am sorry for keeping you waiting".
  - e. If at any time a caller is verbally abusive or it appears that you are unable to assist the caller, contact the Supervisor, Group Lead or Tech in charge (TIC).
5. Any patient information provided must be done in accordance with HIPAA standards.
  - a. Results may be provided to the physician(s) caring for the patient only.
  - b. Patients must show identification and complete a Request to Access Protected Health Information (PHI) form to obtain a copy of their results. Results are NOT provided to patients over the telephone or to other individuals.
6. If a nursing unit calls for results and test is pending:
  - a. Obtain patient name, medical record number, test and time of collection.
  - b. Ask caller if you may place on hold
  - c. Call the laboratory section and provide patient and test information. A tech will provide an estimated time of completion.
  - d. Return to caller and indicate when test will be completed.
7. Transferring a call within the hospital or the department:
  - a. Write down the caller's name and contact information in case they get disconnected.
  - b. Let the caller know that you are transferring the call.
  - c. If the caller does not want to be transferred, try and help them or collect the necessary information and let them know that someone will call them back.

- d. To transfer the call:
  - 1) Press the transfer key
  - 2) Dial the extension
  - 3) Wait until phone is answered and relay message
  - 4) For manager/supervisors/pathologist, verify that call can be transferred. If not, take message or connect to voicemail
  - 5) Press transfer key after recipient accepts
  - 6) If you get voicemail go back to the caller and give them the option of going back to voicemail or not.
  
- 8. Telephones are to be utilized for business purposes. Pay phones are to be used for personal calls.
  
- 9. Personal cell phones are not permitted within the laboratory areas. Refer to 'Cell Phone Usage and Electronic Media Players Policy' for specific information.

**6. RELATED DOCUMENTS**

~~Call Handling, Laboratory policy~~

Patient Requesting Results, Client Service procedure

HIPAA Policy, Laboratory policy

Cell Phone Usage and Electronic Media Players Policy, Laboratory policy

**7. REFERENCES**

Adventist Healthcare Hospital policy

Quest Diagnostics *Call Handling SOP*, Client Service Leadership Team, QD intranet

**8. REVISION HISTORY**

Version	Date	Reason for Revision	Revised By	Approved By
		Supersedes SOP L040.003		
000	6/3/2010	Updated owner Section 5: #1 – added guidelines #2 – added note for outside calls	L. Barrett	L. Loffredo
001	1/30/2013	Section 5 (#9) & 6: add reference to cell phone policy	L. Barrett	L. Loffredo
002	1/4/2017	Header: add other sites Section 5: add reference to App A, edit script for answering phones Section 6: remove Call Handling SOP Section 9: add App A Footer: version # leading zero's dropped due to new EDCS in use as of 10/7/13	L Barrett	R SanLuis

**9. ADDENDA AND APPENDICES**

[Appendix A: Call Handling Guidelines and Expectations](#)

Form revised 3/31/00

## Appendix A

### Call Handling Guidelines and Expectations

#### Anticipate and Satisfy throughout Each Call

Expectation
Utilize all resources and be prepared to provide additional information during the call to prevent callbacks.
Release results only to authorized personnel; confirm contact information, fax number or printer number before releasing information.
Never hang up on a caller.

#### A. Put Patients First

Expectation
Listen carefully and respond appropriately to let the caller know you have heard them and are focusing on their issue.
Advise patients or clients what you can do for them, always demonstrating concern for the patient.
Use caller's name whenever possible.
Make the caller feel important by being proactive and anticipating unspoken needs.
Communicate Critical Value and STAT results in a timely manner.

#### B. Dedicated Professional / Privacy / Ownership

Expectation
Always use polite and professional language on the telephone and maintain control of the call.
Ask permission and wait for agreement before placing a caller on hold.
Know when to transfer a call and how to announce and effectively complete call transfers.
When dealing with an irate client, remain calm, listen attentively to the client, and then ask permission to continue.
Remember that there may be more than one correct answer and offer alternative solutions.
Take ownership of the call and be perceptive to patient and client needs but know when it is appropriate to escalate an issue.
Recognize language barriers and adjust speech accordingly. Contact registered translators if necessary.
Adhere to all compliance regulations and protect the privacy of each patient.
Set reasonable expectations for calling back patients and clients and keep commitments with regard to follow-up activities.

### C. Courteous Tone

<b>Expectation</b>
Always smile and speak clearly using polite, courteous, and professional language, which communicates a friendly and caring desire to provide service.
Do not use slang or acronyms and avoid using words or phrases that have a negative connotation.

### D. Reduce Anxiety / Testing & Services

<b>Expectation</b>
Be able to respond quickly and accurately to questions about tests and services.
Be aware that there are certain tests and screening procedures that cause greater anxiety for patients.
Demonstrate a sense of urgency by ensuring clients and patients are assisted as quickly as possible.
Recognize characteristics that demonstrate nervousness or anxiety in a caller and respond appropriately.
Be respectful of patient and client time. Ask permission to research issues that cannot be immediately addressed and set an agreed upon time for callback.

### E. Timely, Accurate Communications

<b>Expectation</b>
Accurately communicate test requirements using the most current reference material and verify caller understanding.
Follow laboratory policy for communicating Critical Value and STAT patient results in a timely manner.
Before ending the call, confirm the fax number when faxing results or other informational material.

### F. Quality

<b>Expectation</b>
Act as advocate for patients and clients by considering patient impact when making decisions.
Listen carefully to patient and client concerns and agree to research opportunities to improve our business processes.

### G. Document Interactions

<b>Expectation</b>
Maintain documented call notes of all client interactions according to protocol, including the name of the contact person along with any special instructions.

Authenticate the call by documenting the full name and job title of the person receiving test results along with any special instructions according to the protocol.

Document only facts and data in a clear and concise manner using approved abbreviations.

Require physician or authorized person to read back all results to ensure accuracy.

### End Every Call with Thank You

#### Expectation

Sincerely thank the caller and successfully conclude the telephone conversation by confirming the caller's issues have been addressed. Remind caller of your name and inquire if there are any additional concerns before allowing the caller to hang up. "Again, my name is \_\_\_\_\_ and I want to thank you for calling. Is there anything else I can help you with today?"