

Excellent Customer Service *Guide*

01

Stop what you are doing, take a deep breathe and *smile!* (patients can hear your smile)

02

Make the person on the other end of the phone feel welcomed and *important*

03

Anyone answering your phone needs to know their *purpose* (get the patient into the office)

Quick Tips: First phone call through the checkout process

Create An Appointment

- Trained staff handles call and schedules appt
- Get email address and cell phone number
- Get insurance information and verify it
- Repeat day and time of their appointment
- Reminder about new patient paperwork
- Enter referral information

Appointment Flow

- Greet new patient
- Build rapport
- Explain how appointment will run
- Review medical history

Patient Arrival

- If the patient is late, call and get them in asap
- Greet patient warmly and welcome them
- Verify that paperwork is filled out and signed
- Update chart and let hygienist know the patient is ready
- In reception area, talk with the patient
- Enter all paperwork into chart within 30 minutes
- Verify insurance immediately
- Enter patient's medical history

Give Patient Their Recare Packet

- Give packet and explain "care to share" card
- Verbally ask for a referral and review



Don't Drop The Ball: A hand off is essential when providing excellent customer service. From the moment a patient is seated until the moment they walk out the door, they need to be directed by a staff member and handed off when moving from one area of the office to the next.