


FACULTY PRACTICE GROUP – Ambulatory Operations STANDARDS AND GUIDELINES	
SECTION: Front Office Operations SUBJECT: Greeting Guidelines for Telephone Services	REFERENCE #: PAGE: 1 OF 2
APPROVALS: FPG: <input checked="" type="checkbox"/> CAO-SC: <input checked="" type="checkbox"/> APCA: N/A EAC: N/A	EFFECTIVE: 10/2008

PURPOSE:

This guideline is intended to provide our patients with a consistent and standard greeting through out FPG operations. This will apply to FPG staff in the outpatient practices, Physician Support Services in the Managed Care, and Billing operations. It will specifically address the telephone greeting and transfer of call.

POLICY:

All telephone calls will be answered with a 3 part greeting through out the Faculty Practice Group outpatient practices and Physician Support Services business groups. Any telephone call that requires transfer to another service will be done so in a consistent manner. This policy is intended to provide direction to staff and to ensure that our service is consistent through out our practices and business.

PROCEDURE:

A. Receiving the Call - When a call is received in the FPG outpatient practices or PSS business groups, a 3 part greeting will be used. The expectation is that the greeting will be performed in a positive, upbeat tone.

- Part 1 - Greeting and identification of place the caller has reached- A salutation is expected followed by the UCLA - name of practice or area where call is being answered.

Example: "Hello, you have reached UCLA - NAME OF PRACTICE AND/OR SERVICE AREA" or "Thank you for calling – NAME OF PRACTICE OR SERVICE AREA"

- Part 2 - Identification of person answering the call - the individual answering the call will identify himself/herself.

Example: "This is NAME OF INDIVIDUAL, EXPLAIN ROLE IF APPLICABLE".

- Part 3 – Service - the individual answering the call will request how they can be service to the caller.

Example: "How may I help you?"

PLEASE ADDRESS THE CALLER BY MR., MRS, MS, DR. (FORMAL GREETING) AND THEIR LAST NAME – UNLESS TOLD OTHERWISE.

- B. If a patient is calling, the individual will perform the necessary search on the patient by asking the appropriate questions. **It is not mandatory that the patient have their UCLA Patient ID**, as the search can be accomplished through the individual's date of birth. Please also verify the last 4 digits of the patient's social security number. The intent is to provide assurance to the caller that we have their information and we are able to assist them with their question or concern.
- C. Transferring the Call – If it is determined that the call needs to be transferred the following procedure will be used:
- The caller will be advised that their call is being transferred to the name of an individual or area.
 - The staff person will provide the phone number of the area that they are transferring the call.
 - The staff person will stay on the line and will introduce the caller to the transferred area.

Example: “Mr./Mrs. NAME OF CALLER, I am transferring you to NAME OF INDIVIDUAL OR AREA at PHONE NUMBER.” Once call is transferred, the individual transferring the call will continue with – “Hello, this is NAME OF INDIVIDUAL TRANSFERRING CALL. I am transferring Mr./Mrs. NAME OF CALLER. She/He needs”

- C. Quality Assurance – in order to assure that the above policy is followed, we will perform ongoing quality assurance through our “Mystery Caller” Surveys. These results will be reported to FPG Administration and the Clinic or PSS management.

REVISION HISTORY

Effective Date:

Review Date:

Revised Date: October 1, 2008