## Five Scripts For Great Hand-Offs

### Nurse – Handing off patient and companion to physician

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| **GREAT Behaviors** | **GREAT Words** |
| **If the physician is not there:**   * Use words that prepare the patient for your departure and for what will happen next. * Walk with patient and gesture with your arm to show the way. * Once in the room, invite them to make themselves comfortable. * Overestimate the amount of time they can expect to wait and tell them what to expect if the wait time is longer. * Build the patient’s confidence in the doctor. * Tell them that you are leaving, but offer to help or answer questions first. * Give a gracious goodbye in which you address patient and companion by name. | * “Great, Mr. Hampton! I’ve got all I need. Thank you!” * “Now, if you’ll come with me, I’ll show you to the room where Dr. Clark will see you.” * “Please make yourself comfortable. * “Dr. Clark should be here within 10 minutes. If for some reason, she can’t get here by then, I’ll be back to give you an update.” * *If patient is new*: “Mr. Hampton, you’ll be in great hands with Dr. Clark. She’s a wonderful doctor.” * *If patient already knows the doctor:* “I know Dr. Clark will be very glad to see you again…” * “Before I go, is there anything you need or any questions you have? * “I hope all goes well, Mr. Hampton, and I hope to see you on your way out. |
| **If physician is there:**   * Use words that prepare the patient for the transition. * Explain what will happen next. | * “Great, Mr. Hampton! I’ve got all I need. Thank you!” * “Now, if you’ll come with me, I’ll show you to the exam room where Dr. Clark will see you.” |
| * Along the way, walk close to the patient and stay connected. * Make small talk. | * “Isn’t it a nice day? I’m so glad the rain finally let up.” |
| * If first visit with the doctor: Introduce the patient to the doctor. Say the patient’s full name first. * If patient has seen this doctor before, remind the doctor of this. | * “Oh hi, Dr. Clark, I’m glad you’re here. Mr. Hampton, this is Dr. Clark. You’ll be in good hands with her.” * “Dr. Clark, Benjamin Hamilton is here to see you again.” |
| Introduce the doctor to the patient. | * + “Dr. Clark, this is Mr. Hampton.”   + Dr. Clark: “Nice meeting you Mr. Hampton. I was expecting you. Come right in.” (Turning to nurse: “Thanks Peg. I’ll take good care of him.” |
| Smile and make eye contact. Share a good intention. | * “Okay, Mr. Hampton, you’re all set. I hope all goes well for you!” |

### Receptionist — passing a patient with a billing question on to a billing person

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| **GREAT Behaviors** | **GREAT Words** |
| * Make eye contact and address the person by name. * Explain what and who. * Share the good intentions behind the request. * Build customer's confidence in your co-worker. * Solicit the person's agreement. * Gesture enthusiastically and walk *with the patient* to your coworker's desk. | * "Ms. Hamilton, before we schedule your follow-up appointment, Katy, the person who handles all our insurance and billing, would like to ask you a question regarding your insurance." * "Katy's here to make sure everything goes smoothly so you can continue to get the care you need." * “Can you speak with Katy for a few moments?” |
| * Introduce your coworker by full name and position. * Then introduce the patient to your coworker. * Say something to remind coworker of why the patient is here. | * "Ms. Hamilton, this is Katy Hammond our Financial Accounts Representative. Katy helps all of our patients with their insurance and payment." * "Katy, this is Ms. Hamilton, here to discuss your insurance question." |
| * Before you go, clarify when and if they will see you the person again. | * “Ms. Hamilton, when you and Katy have finished talking, you can come back out to the front desk and I’ll help you schedule your next appointment.” |

### Transferring a Phone Call

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| **GREAT Behaviors** | **GREAT Words** |
| * Keep in mind that the caller may have been transferred to several other offices before reaching yours. * If the caller reached you by mistake when trying to reach someone else, tell the caller which office he or she has reached and offer to transfer the call to the proper office. * Take the time to understand what the caller needs and to figure out who he or she should actually be calling. * If you do not have the correct extension at your fingertips, take the time to look it up. * Be sure to give the caller the correct number for future use and for use if transfer is disconnected. When you transfer the call, stay on the line to make sure you’ve connected the person to the place they want to reach. | * “Can I have your name please? * “I’m sorry, Mr. Mancini. This is Martin Internal Medicine, and it sounds like you want the pharmacy. I’ll be glad to transfer your call.” * “In case we get disconnected or you get a busy signal, would you want to write down the number? Is a pencil handy?” * “Their number is XXX-XXXX. Can I repeat that for you?” * “Please hold while I transfer your call.” * “And thank you for calling.” |

### Receptionist – Passing a patient with a complaint to the office manager

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| **GREAT Behaviors** | **GREAT Words** |
| * Call the person by name and thank the person for speaking up. * Express empathy without judging, agreeing, or disagreeing. * Tell patient that you want to help. * Handle the issue or draw in the right person who can. * Build up your colleague in the patient’s mind. Express confidence that this colleague cares and will help. * Give the person options. * Follow through on the option they choose. * Make sure you close the loop. Make sure the person connects with the office manager before you let go. | * Receptionist: *"I’m glad you spoke up about this, Mrs. Jones. It sounds very frustrating. I want to connect you to the right person. I think Marla Roberts, our office manager, is the person who can best help you. I know she’ll be very concerned. Would you like me to see if Marla’s available now or would you prefer that I have her call you later today?”* * To Marla: “*Marla, I’m glad you’re here. You know Mrs. Jones? She has a concern that I know you’ll want to know about. Do you have a few minutes to talk with Mrs. Jones? I know you can help.”* * To Mrs. Jones: “*You’ll be in good hands with Marla. Thanks for waiting.”* |

### Taking and delivering a phone message

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| **DO’s** | **DON’T’s** |
| * *“I’m sorry, he’s not available right now”* * *“She’s out of the office at the moment. I expect her back at 4:00. May I take a message?”* * *“He’s in a conference right now but I’ll be happy to take a message.”* | * “*She’s impossible to find or reach, but as soon as I can, I’ll give her your message.”* * *“She’s working at home.”* * *“She’s always off somewhere. It’s a real challenge to get her.”* * *“He’s taken the afternoon off for personal business.”* |
| **ACTIONS** | |
| * Write down the caller’s name and phone number. Include other identifying information (e.g., name of patient the caller is associated with). * Don’t be shy about asking the caller to spell out a difficult name when necessary. * Note the date and time of the call, and the subject if you can tactfully find that out. This will help your coworker prioritize. * If you can, locate any information your coworker will need when returning the call and provide it to him or her with the message. * Be sure to put your initials at an appropriate place on the message so that your coworker will know who took the call in the event of questions. * Sometimes you may have to take a message for someone who is in and nearby but who is on the phone or involved in some other work requiring immediate attention. You have a caller on the line and you need to get your coworker’s attention in order to complete the call. To attempt this, place a written note in front of your coworker explaining the situation. Wait for a response. Your co-workers will appreciate your courtesy and thoughtfulness as much as patients do. | |

Source: *Physician Entrepreneurs:* *The Quality Patient Experience* by Wendy Leebov, 2008.