

Improve Telephone Access

Tool 7

Overview

Telephone contact plays an important role in health care. The efficiency of a telephone contact will shape a patient's impression of your practice. Making your telephone system patient-friendly is an important aspect of addressing health literacy, as some patients will hang up if the telephone system is confusing or it takes them too long to reach a person. Try evaluating your phone system and procedures to identify opportunities for improvement. Efficient and courteous call management may save your practice time and money and should benefit your patients as well.

Actions

Assess your telephone system.

- **Call your practice** as if you were a patient, both during and after business hours.
 - Did you get a busy signal? How long did you wait for staff to answer the phone?
 - How long did it take to reach the staff member or obtain the information you wanted?
 - If using an automated system, were the menus easy to understand? How many buttons did you need to press?
 - Were you put on hold? For how long? Were you transferred to more than 1 other person?
 - Were you instructed to call another number? Were you told to use the patient portal?
- **Use the Health Literacy Environment Activity Packet** to assess other aspects of your phone system.
- **Ask patients about the phone system.** What comments do they have?

Improve your telephone system.

- **Decide whether to implement an automated telephone system** if you don't already have one. Some practices find it more efficient to use an automated system. Patients are less likely to get a busy signal or be put on hold due to the streamlining of calls. However, some practices like to stick with the human touch. Some patients are intimidated by automated systems or like talking to a person instead of a machine.
- If you opt for an automated system:
 - Offer choices in the languages commonly spoken by your patients.
 - Always have an option to speak to a person.
 - Create a menu with no more than 5 choices, such as:
 - Option 1. Appointments.
 - Option 2. Medicine refills or referrals.
 - Option 3. Directions to the office.

- o Provide directions for different forms of transportation (e.g., driving, public transportation).
- o Reference familiar landmarks.
- Option 4. Speak to someone directly.
- Option 5. Repeat the menu.

Refer to the Sample Automated Telephone System Menu for a flow chart of this menu.

If you opt to have a person answer the phones, set policies for:

- How quickly phones should be answered (e.g., within 3 rings).
- Checking back with people placed on hold after a set period of time (e.g., after 1 minute).
- Transferring calls (e.g., avoid asking patients to dial another number), including plans for what to do if the other party doesn't pick up the call.
- Offering to take messages or transfer to voicemail.
- Have a schedule to ensure phones are covered throughout office hours. If your office closes for lunch, have a message on your machine with the hours you are closed.
- Create an after-hours message or have a phone service cover the phones during non-business hours. After-hours messages should include instructions to call 911 in case of an emergency and a phone number to reach the clinician providing coverage. Repeat the phone number slowly, so patients can write the number down.

Improve how well clinicians and staff communicate on the phone.

- Develop and use written scripts with responses to frequently asked questions to assure that clear, consistent answers are provided.
- Use Tool 4: Communicate Clearly to educate staff about approaches for communicating effectively with patients.
- Encourage staff to confirm patient comprehension by using the Teach-Back Method to ensure instructions given over the phone were understood. (See Tool 5: Use the Teach-Back Method.) In addition, staff members can address any confusion by asking “What questions do you have?” at the end of each call.
- Make use of telephone interpreter services for patients who need language assistance. (See Tool 9: Address Language Differences.)

Educate patients about the phone system.

- **Develop a brochure.** Create and distribute a brochure that explains when and how to contact the practice, both during and after office hours. See Tool 11: Assess, Select, and Create Easy-to-Understand Materials to help you design a practice brochure that will be easy to read and understand.
- **Talk with patients.** If a patient needs to contact the practice for something specific, for example to talk to a nurse, tell the patient exactly what he or she should do.

Track Your Progress

Periodically reassess your phone system. Do you see fewer problems over time?

On a routine basis, ask a sample of patients to provide input on the phone system. For example, during a specified week every quarter, have staff ask patients at the end of each call or at check-out if they have had problems with the phone system or have any suggested changes. They could ask, “Have you had any trouble reaching the office on the phone lately?” or “We have changed our phone system recently. Do you find it harder or easier to use than our old system?”