

CHAPTER 11**Telephone Techniques****REVIEW****Vocabulary Review****Matching**

Match the key terms in the right column with the definitions in the left column by placing the letter of each correct answer in the space provided.

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|-------------------------------------|--|
| _____ 1. screening a call | a. speaking in a positive, respectful manner |
| _____ 2. HIPAA | b. calls made to the medical office |
| _____ 3. incoming calls | c. writing in the patient's chart |
| _____ 4. example of courtesy | d. telecommunication |
| _____ 5. enunciation | e. concerned with privacy and confidentiality |
| _____ 6. routing list | f. apologizing for delays or errors |
| _____ 7. telephone answering system | g. specifies who is responsible for various types of calls and how the calls are to be handled |
| _____ 8. documenting | h. automated voicemail system |
| _____ 9. ARU telephone system | i. determining the need of the caller |
| _____ 10. tone | j. clear and distinct speaking |

Passage Completion

Study the key terms in the box. Use your textbook to find definitions of terms you do not understand.

enunciation
etiquette

pitch
pronunciation

telephone triage

In the space provided, complete the following passage, using the terms from the box. You may change the form of a term to fit the meaning of the sentence.

The telephone is an important tool in today's medical practice. How you handle telephone calls will have an impact on the public image of the office. When speaking on the telephone, always use proper telephone (11) _____ to present a positive impression of the office. Make your voice pleasant and effective by varying your (12) _____. Remember not to mumble. Good (13) _____ will help the caller understand the important information you are trying to convey. Proper (14) _____ of the caller's name will help her feel welcome and important. In today's medical practice, the process of determining the level of urgency of each call and how it should be handled or routed is called (15) _____.

11. _____

12. _____

13. _____

14. _____

15. _____

Content Review

Multiple Choice

In the space provided, write the letter of the choice that best completes each statement or answers each question.

- _____ 1. When checking for understanding during a call,
A. watch for visual signals.
B. ask the caller if there are any questions.
C. repeat everything at least twice.
D. ask the caller to explain the information to a third person.
- _____ 2. The correct use of a telephone log includes
A. keeping 3 copies of each phone message.
B. keeping 2 copies of each phone message.
C. using only a spiral-bound book.
D. using only a message pad.
E. giving the original message to the appropriate person and retaining a copy.
- _____ 3. If a caller refuses to discuss his symptoms with anyone but the physician,
A. schedule an appointment immediately.
B. try to talk the patient into talking with you.
C. have the doctor return the call.
D. call the patient the next day to see whether he has changed his mind.
- _____ 4. A fax machine
A. should never be used to send a patient referral.
B. is confidential.
C. uses a phone line.
D. is inappropriate for use in a medical practice.
E. is a type of telephone routing system.
- _____ 5. An automated telecommunications system
A. is inappropriate for use in a medical practice.
B. is used in many hospitals and ambulatory care settings.
C. is more expensive than using a phone operator.
D. requires that the caller know exactly who he wants to speak to.

- _____ 6. What is the best way to deal with salespeople in a medical office?
 - A. On the telephone, ask the salesperson to send information about new products and services.
 - B. Do not speak to salespeople on the phone at all. Just hang up.
 - C. Allow salespeople to meet with the doctor between patients based on how long they have had to wait.
 - D. Medical assistants do not deal with salespeople in person or on the phone. That is the role of the doctor.
- _____ 7. A patient calls and tells you he is having severe vomiting. What should you do?
 - A. Make an appointment for the next day.
 - B. Immediately put the call through to a doctor or handle the call according to the established office procedures for patients that need immediate medical help.
 - C. Make an appointment for the patient within the next 3 days.
 - D. Make an appointment for an annual physical exam.
- _____ 8. If you are in doubt about whether a situation is a medical emergency,
 - A. you should treat it like an emergency.
 - B. you can ignore the situation if the patient tells you he does not want to see the doctor.
 - C. you should ask the patient to sit down so he can be observed.
 - D. you should rely on your intuition to do the right thing.
- _____ 9. A medical assistant may release patient information to an outside caller
 - A. only when requested to do so by the physician.
 - B. only when that caller is a physician.
 - C. only when that caller is an attorney.
 - D. whenever it is requested.
- _____ 10. Pronunciation is
 - A. the high or low level of speech.
 - B. the pitch of the voice.
 - C. the tone of the voice.
 - D. saying words correctly.
 - E. speaking without any accent.
- _____ 11. The best way to hold a telephone when you are using it is
 - A. with one hand.
 - B. with a telephone rest.
 - C. propped on your shoulder so you have both hands free.
 - D. propped on your shoulder, making sure you change shoulders every 3 minutes to avoid fatigue.
 - E. Both A and B
- _____ 12. Telephone triage
 - A. is the screening and sorting of emergency incidents over the phone.
 - B. is only done by RNs.
 - C. is an automatic message that is easily programmed into an automatic router.
 - D. means diagnosing the patient over the phone.
- _____ 13. How do you properly respond to a patient who is asking for the results of a lab test?
 - A. Tell the patient the results.
 - B. Never tell the patient anything.
 - C. Tell the patient the results only when the results are normal.
 - D. Follow the policies of the medical office.

- _____ 14. If a patient remains dissatisfied after discussing a bill,
- A. document all comments and relay the information to the physician.
 - B. tell the patient that you are sorry he is dissatisfied, but the bill stands as is.
 - C. turn the patient's bill over to a collection agency.
 - D. terminate the patient's care until the bill is paid.
- _____ 15. How should a medical assistant respond to patient complaints?
- A. Listen carefully but never admit mistakes.
 - B. Defend the doctor and the policies of the practice.
 - C. Be careful to only raise your voice when the patient raises his voice.
 - D. Acknowledge the patient's anger.
 - E. Do not allow the patient to talk down to you.

Sentence Completion

In the space provided, write the word or phrase that best completes each sentence.

- | | |
|---|-----------|
| 16. The medical assistant handles calls that deal with _____ issues. | 16. _____ |
| 17. _____ is a medical emergency in which there is a drop in body temperature during prolonged exposure to cold. | 17. _____ |
| 18. If you will be discussing clinical matters over the telephone, it is a good idea to pull the _____. | 18. _____ |
| 19. Never release any patient information to an outside caller unless the _____ asks you to. | 19. _____ |
| 20. The medical assistant may be responsible for making routine _____ to verify that patients are following treatment instructions. | 20. _____ |
| 21. _____ is clear and distinct speaking. | 21. _____ |
| 22. Before ending a telephone call, it is good professional behavior to always _____ the important points of the conversation. | 22. _____ |
| 23. Keeping a _____ on the desk allows you to easily find frequently used telephone numbers. | 23. _____ |
| 24. When taking a telephone message, always record the date and _____ of the call. | 24. _____ |
| 25. _____ is a medical emergency in which the patient experiences paleness, feeling faint, and a weak, rapid pulse. | 25. _____ |

Short Answer

Write the answer to each question on the lines provided.

26. List the features of good communications skills.

27. List three types of calls that a medical assistant would handle.

28. List the steps in calling in a prescription refill to a pharmacy.

29. List three types of incoming calls.

30. List at least ten symptoms or conditions that would qualify as a medical emergency.

31. What are five ways you can make your telephone voice effective?

32. What is the typical procedure for putting a call on hold?

33. How is telephone triage conducted?

Critical Thinking

Write the answer to each question on the lines provided.

1. How can the telephone image you present have an impact on public perception of your medical office?

Name _____ Class _____ Date _____

2. Describe how you might handle a caller who is not a patient in the practice and who wants a prescription.

3. Describe how a medical assistant might respond when a patient calls the office to discuss symptoms she is experiencing.

4. If a patient calls with an emergency situation and can only stay on the telephone for 1 minute, what questions would be the most important to ask?

5. Discuss what you should do if you do not know how to respond to a caller's question on the phone.

6. The physician requests that you contact a patient and ask him to come in for an appointment, but the patient refuses to come in. What do you do?

7. Discuss how you would respond to a patient who calls to request a prescription refill.

8. Discuss guidelines for dealing with an angry caller.

APPLICATION

Follow the directions for each application.

1. Handling a Patient Call

Work with two partners. Have one partner play the role of an angry patient calling to complain about being billed for a procedure that never took place. Have the second partner act as a medical assistant handling the call. Have the third partner act as an observer and evaluator.

- a. Role-play the telephone call. The medical assistant should listen carefully to the caller, taking notes about the details of the problem. The medical assistant should also be sure to ask all necessary questions.
- b. The medical assistant should respond to the caller's complaint in a professional manner and explain the specific action that will be taken to address the issue.
- c. Have the observer provide a critique of the medical assistant's handling of the call. The critique should evaluate the use of proper telephone etiquette, the proper routing of the call, and the assistant's telephone notes. Comments should include both positive feedback and suggestions for improvement.
- d. Exchange roles and repeat the exercise. Allow the student playing the caller to choose another reason for the call.
- e. Exchange roles again so that each member of the group has an opportunity to play the role of the medical assistant.
- f. Discuss the strengths and weaknesses of each group member's telephone etiquette.

2. Taking Telephone Messages

Work with a partner to design the best possible telephone message pad or telephone log for a medical office.

- a. Consider the various types of incoming calls that the medical practice receives. Review the different types of information that a person taking a message might need to obtain. Make a list of the types of calls and types of information. Think about the order in which the information is obtained. Decide how much space is needed for each entry.
- b. Choose which you will design—a telephone message pad or telephone log. As you work with your partner to design it, consider these questions: What is the best size for the pad or log? How many messages will fit on one page? How will copies be made? What color will the pad or log be? Pay attention to the information that must be included, the space available for each message, and the layout of the page.
- c. Test your telephone message pad or log. Have your partner role-play a patient calling a medical office. Use your message pad or log to take the message.
- d. Then trade roles and repeat the role playing. Discuss the strengths and weaknesses of your message pad or log. Revise your design as needed.
- e. Share your message pad or log with other pairs of students. Critique each other's designs. Discuss how the designs are different and how they are similar. Assess the strengths and weaknesses of each design. Offer suggestions for revisions.
- f. Make final adjustments to the design of your telephone message pad or telephone log on the basis of your classmates' feedback.

CASE STUDIES

Write your response to each case study on the lines provided.

Case 1

You overhear another medical assistant speaking rudely to a patient. What should you do?

Case 2

A salesperson is continually calling on the telephone at the busiest time of day, tying up the line that is used to take patient calls. How might you handle the situation?

Case 3

In one morning, you receive calls from a patient with an emergency, an attorney, a physician from another medical office, and a salesperson. Describe how you would route each of these calls.

Case 4

A patient calls and says that he thinks he is having a heart attack. What do you do?

Case 5

Mrs. Rosetti calls the office and discusses a confidential medical problem with you. How should you handle this situation?

Case 6

A physician calls and asks to speak to the physician in your practice. The physician is with a patient. What do you do?
