



TIPS for practicing TELEPHONE, VIRTUAL, and RPM visits

Be an active listener: A technique called “active listening” is a helpful tool to ensure that understanding is complete. In this technique, the listener will rephrase the information they heard in their own words. If this information is correct, the exchange is complete, if not the sender of the information can correct any misunderstandings at this time. This exchange takes only a little more time and is an efficient tool for creating accountability because everyone involved in the exchange knows that expectations were clear and understood.

- Focus on the speaker
- Act interested
- Try not to interrupt
- Avoid talking to anyone else
- Keep your mind on the issue being discussed

Have good phone manners: Having good phone manners is a simple task. To have good phone manners simply means being professional and treating others the way you want to be treated if you were the caller. Some examples include:

- Communicate your name and a friendly greeting
- Smile, the caller can hear your smile through the phone
- Speak slowly and clearly
- Never chew food, gum or drink anything while on the phone
- Ask permission before placing a caller on hold

Maintain Confidentiality: Maintaining patient confidentiality not only makes patients feel secure about being treated at your medical facility, but it is also the law. Any organization that accesses patient health information is considered a covered entity and is required by law to comply with HIPAA provisions or face civil and/or criminal penalties. It is imperative that medical records remain confidential and cannot be accessed by people that do not have proper authorization. Disclosures made regarding a patient's protected health information (PHI) without their authorization is considered a violation of the Privacy Rule.

- Be cautious about the information that is given over the phone
- Keep in mind, others may be able to hear your conversation
- If the caller is not the patient, never discuss personal information without permission

Things to Consider: Telephone etiquette is not just what you say or what you do, it is also how you say it and how you do it. Consider these the next time you talk to a patient or other customer on the telephone.

- Always thank them for calling
- Never hang up first
- When taking messages, get as much information as possible
- Stay calm and polite, even when a patient is rude to you