

# Welcome Call

**BACKGROUND:** We place two calls when a new patient books an appointment. The first is the Welcome Call, which is placed immediately upon notification of the scheduled event. The Welcome Call is placed by the PSC in order to gather information and confirm details for the upcoming visit. Please use the following script for this call.

## THE CALL MAY GO LIKE THIS:

**Ring Ring. Patient:** Hello?

**PSC:** Hello, may I speak with Mr./Mrs. (Patient's last name)?

Hi, (Patient's name), this is (Your name) calling from (Name of clinic). I just received notice of the Hearing Evaluation that you scheduled and I would like to take this opportunity to introduce myself. Do you have a few moments so we can get you checked in for your upcoming visit?

### ● Yes

**PSC:** Wonderful! First, I would like to confirm that we have your correct information:

- Can you verify the spelling of your first and last name?
- It looks like we have your address listed as (read off address), is this correct? (Make any corrections.)
- Is the telephone number (list phone numbers) the best number to reach you with?
- Mr./Mrs. (Patient's last name), what is your date of birth?
- Did you receive an email confirmation with all of your appointment details? (If no) Where should I send it?

### ● No

**PSC:** I understand. Is there a better time for me to contact you today?

**YES:** Great, I will call you (date) at (time). Have a great day!

**NO:** That is alright! We will contact you the day before to confirm your appointment. In the meantime if you have questions please feel free to reach out, our direct office number is (clinic phone).

**PSC:** Thank you! The last item I would like to review with you is insurance. Many of our patients ask that we contact their insurance company to find out what/if any benefit they have for hearing health. Is this something I can do for you prior to your appointment?

### ● Yes, please.

**PSC:** Fantastic -

- What kind of insurance do you carry? Is this your only policy?
- Do you happen to have your card(s) handy?
- (If so) I will only need your insurance ID and group number (collect this info).
- Are you the primary on the account? (If not, gather full name and DOB of the primary.)

Thank you. I will have your benefits available when we see you on (date) at (time).

### ● No, I would rather not. This should be a free appointment!

**PSC:** Yes, your consultation is free. We will never bill your insurance without your prior knowledge. Checking your benefits only allows us to give you information, should a treatable hearing loss be discovered.

# Welcome Call

**PSC:** I appreciate you taking this time to talk with me today. We're almost done, just a few more questions:

- Are there any specific hearing questions you wish to discuss with the specialist?
- Part of our evaluation involves a procedure for testing speech recognition, and it is essential to have someone at the appointment whose voice is familiar to you. (Confirm Companion, or) Is there a significant other or family member that can accompany you and serve as the familiar voice?
- Do you know how to find us, or can I provide more detailed directions?

We look forward to seeing you and (Companion's name) on (date and time). If there's anything I can help you with prior to your appointment, my direct number is (clinic phone). Please feel free to call anytime! Thank you and have a great day!

## ● Voicemail Script

**Date/Time of Call:** \_\_\_\_/\_\_\_\_/\_\_\_\_ \_\_\_\_:\_\_\_\_

**Clinic:** Hello, this is (Your name) calling from (Name of clinic). I just received notice that you scheduled your Hearing Evaluation with (CCC Agent). I was hoping to introduce myself and ask you a few questions prior to your appointment. Please call me at your earliest convenience at (clinic phone). Thank you, have a great day!