Streamlined Call Documentation Processes

1. Start

- Patient Call Received

2. Importance of Documentation

- Enhance Patient Experience
- Provide Consistent Responses
- Improve Team Communication
- Avoid Conflicts and Complaints

3. What to Document

- Billing Questions
- Missed or Late Appointments (Reasons)
- Insurance or Procedure Queries
- Voicemails (Details and Numbers)

4. Documenting Process

- Train Front Desk Team to Record Relevant Information
- Ensure Notes are Signed for Accountability
- Use Practice Management Software

5. Where to Document

- Utilize Practice Management Software (e.g., Communication Center)
- Track all Patient Interactions (Calls, Texts, Emails, Records)

6. Outcome

- Improved Patient Relations
- Efficient Follow-Up and Information Sharing

7. End

- Call Documentation Completed