



Caller Training

Bring Patients Back With Brevium!

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Calling Tips

Following is a basic script to use when calling patients through Brevium. It looks bone simple, but the feedback we've had from other practices is that it's very effective.

Good afternoon, may I speak to Ms. Dorothy Jones?

Hello Ms. Jones! This is _____ from _____ Eye Clinic calling. How are you doing today?

I'm calling because Dr. _____ asked me to call about getting you back in for an eye exam.

I can schedule that for you right now if you like!

Or

When would be the most convenient time to get you back on his schedule?

A couple of points:

- We've found that mentioning the specific doctor the patient last saw is more effective. I think it gives the patient a sense of relationship with the practice, and gives the Brevium caller more authority than "just some office guy telling me it's time for my eye exam."
- Saying "due" for an eye exam (or cataract check or dry eye check or whatever) goes over better than "overdue," even though both are technically true; it makes the caller sound helpful rather than accusatory.
- We've learned to avoid mentioning specific conditions; patients with borderline glaucoma, for example, may not know they're being tracked for glaucoma, and get confused if we tell them they're due for a "glaucoma check." Saying "pressure check" or simply "visit with Dr. So-and-so" gets the point across without confusion.
- Make sure to always ask if there are any other patients in the home who need an eye exam. It's a great way to attract new patients to the office.

Calling Statistics

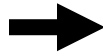
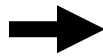
From our experience a typical office can make 20 calls per hour.

Statistical results show that the average office can expect 1 appointment for every 8 calls.

Special Note

Make sure staff taking inbound calls knows about outbound Brevium calls.

Taking a look at Brevium



There are two sides of Brevium.

Brevium Admin—Typically, the Practice Administrator will be the only person with access to *Brevium Admin*. This program is used for configuring calls and tracking results.

Brevium Caller—Here is where your calling team will go when they are ready to call patients.

The following is an example of how the Brevium Caller Screen will look.

Patient Information **Patient Record Number** **Referring Dr. (if any)**

Name / Insurance	Age	Due	With	At	For
Stephanie Hunt A1277	70 F	3 mo. a. in 9 mo.	Wilson (Greg...)	Lehi Office	Cataract
Commercial Primary, Priority Partners, California Eye Care		03/13/11	Wilson (Greg...)	Lehi Office	[Full Exam]
FFS, Comp Management/CMI		06/27/10	Wilson (Greg...)	Lehi Office	[Full Exam]
		05/10/09	Wilson (Greg...)	Lehi Office	[Full Exam]
		05/16/08	Wilson (Greg...)	Lehi Office	[Full Exam]
Referring physician: Walker, Peter					
Louis Hunt A1299	72 M	3 mo. a. in 9 mo.	Wilson (Greg...)	Lehi Office	Cataract
Commercial Primary, Priority Partners, California Eye Care		Scheduled appointment: 05/23/11	Wilson (Greg...)	Lehi Office	[Full Exam]
FFS, Comp Management/CMI		03/13/11	Wilson (Greg...)	Lehi Office	[Full Exam]
		06/27/10	Wilson (Greg...)	Lehi Office	[Full Exam]
		05/10/09	Wilson (Greg...)	Lehi Office	[Full Exam]
		05/16/08	Wilson (Greg...)	Lehi Office	[Full Exam]
Referring physician: Walker, Peter					

Patient Phone Numbers **Current Appointment** **Caller Action Screen**

No prior contact with these patients.

801-432-4365

801-400-0847

Select result:

Busy	Answered...
No answer	
Voicemail	
Disconnected	No phone call...

Shows Any Prior Contact **Patient Look Up** **View Call Statistics**

Caller Instructions

As you make calls to your patients, this table describes how to document the call depending on the results of that call.

RESULT	WHAT TO EXPECT
<p style="text-align: center;">BUSY</p> <p>The line was busy when you called.</p>	<p>If there is another number for this patient you have not called, you will be prompted to try it next.</p> <p>If there are no additional numbers, the patient is taken off the call list for at least 1 day.</p>
<p style="text-align: center;">NO ANSWER</p> <p>No one answered the phone when you called.</p>	<p>If there is another number for this patient you have not called, you will be prompted to try it next.</p> <p>If there are no additional numbers, the patient is taken off the call list for at least 1 day.</p>
<p style="text-align: center;">VOICEMAIL</p> <p>You left a message on voicemail or an answering machine.</p>	<p>If there is another number for this patient you have not called, you will NOT be prompted to try any additional numbers.</p> <p>The patient is taken off the call list, then added back after 45 days for another attempt to contact them. After three messages are left, the patient will not be contacted again for 6 months.</p>
<p style="text-align: center;">DISCONNECTED</p> <p>The number you dialed has been disconnected.</p>	<p>If there is another number for this patient that you haven't tried, you will be prompted to try it next. If you enter a new number into the practice management system without entering that number into Brevium, then we'll pick it up and prompt you to use it the next day.</p> <p>You will be prompted for a new number, and if you provide one, you will be prompted to try it next.</p> <p>The bad number will not be displayed for future calls. In addition, the patient will show up on a special report listing patients with bad phone numbers until the bad number is updated in the practice management system.</p>
<p style="text-align: center;">ANSWERED</p> <p>Someone at the number you dialed answered your call.</p>	<p>A new list of results appears, explained on the "Answered Calls" page.</p>
<p style="text-align: center;">NO PHONE CALL</p> <p>You did not make a call to this patient.</p>	<p>A new list of results appears, explained on the "No Phone Call" page, allowing you to explain why you decided not to call this patient.</p>

No Phone Call Made

If you select **No phone call**, you will be presented with these options. Similar options show up under **Answered** and **Appointment declined**. Choose **No phone call** only when you don't call the patient before determining that no visit is needed.

Result	What To Expect
<p data-bbox="186 541 469 646">No visit needed</p> <p data-bbox="154 657 480 741">It's clear from the appointment history that this condition does not warrant a visit.</p>	<p data-bbox="532 537 1375 594">The patient will be taken off the list until another (different) reason for a visit brings them back onto the list.</p>
<p data-bbox="186 793 469 898">No visit needed for</p> <p data-bbox="154 909 493 993">It's clear from the appointment history that the patient is not yet overdue.</p>	<p data-bbox="532 789 1304 821">You are asked when to try again, and the patient will be brought back then.</p> <p data-bbox="532 915 980 947">Be sure to indicate why you put the call off.</p>
<p data-bbox="186 1050 469 1186">No visit needed – patient seen elsewhere</p> <p data-bbox="154 1197 493 1253">Patient has been dismissed or returned to his referring provider.</p>	<p data-bbox="532 1050 927 1081">Patient will not be contacted again.</p>
<p data-bbox="186 1306 469 1369">Translator needed</p> <p data-bbox="154 1392 508 1449">An alert or phone note indicates a translator is needed.</p>	<p data-bbox="532 1302 1375 1358">Put the language needed in the notes. The call will be held for another caller to make who speaks that language.</p>
<p data-bbox="186 1501 469 1564">Other (bug)</p> <p data-bbox="154 1587 516 1644">Brevium did something wrong that needs to be looked at by Brevium.</p>	<p data-bbox="532 1497 1375 1554">Select this when it's clear that Brevium has done something wrong and you catch the problem before making a phone call.</p> <p data-bbox="532 1587 1375 1703">Recording bugs here has the advantage of recording the patient that was displayed at the time you logged the bug. Be sure to enter a clear description of the problem in the notes, and then email support@brevium.com with a description of the problem and the name of the patient.</p>

Answered Phone Calls

If you select **Answered**, you will be presented with these options:

Result	What To Expect
<p>Appointment Made</p> <p>You scheduled an appointment with the patient or transferred the patient to scheduling after the patient agreed to make an appointment.</p>	<p>The patient is taken off the call list.</p> <p>If the appointment is canceled or never entered into the schedule, the patient will be put back on the call list after four weeks.</p>
<p>Message left</p> <p>You left a message with the person who answered the phone.</p>	<p>You will be asked to enter the name of the person with whom you left a message into the notes, for the call record.</p> <p>The patient is taken off the call list, then added back later for another attempt to contact them after 45 days. After three messages are left, the person will be taken off the list for 6 months.</p>
<p>Translator needed</p> <p>You were unable to understand the person on the phone, because you don't speak the same language.</p>	<p>Put the language needed in the notes. The call will be held for another caller to make who speaks that language.</p>
<p>Call patient back after -</p> <p>Whoever answered gave you a specific time or date to call again.</p>	<p>Be sure to record the date and time to call back.</p> <p>The patient will be taken off the list until the date and time indicated, then placed back on the list.</p>
<p>Patient will call us later</p> <p>The patient got the message and promised to call you when ready.</p>	<p>The patient will be taken off the list for 90 days, and then called again if they haven't called back.</p>
<p>Don't Use This Number</p> <p>Someone answered and indicated that this person no longer lives at this household, or that the number is incorrect. This result is also appropriate when the number is valid but the patient prefers that you not use it to invite them to make appointments.</p>	<p>If there are multiple patients at this household, you will be asked which patients this result applies to.</p> <p>If there is another number for this patient that you haven't tried, you will be prompted to try it next.</p> <p>You will be prompted for a new number, and if you provide one, you will be prompted to try it next.</p> <p>The bad number will not be displayed for future calls. If there is not another number, the patient is taken off the call list so no one else will call them. In addition, the patient will show up on a special report listing patients with bad phone numbers until the bad number is updated in the practice management system.</p> <p>If this number is valid, but the patient prefers that you not use it for this type of call, then don't update the number in your practice management system – just mark it in Brevium with a note making it clear that this is a preference issue, not a bad number.</p>
<p>No, thank you...</p> <p>The patient refused to accept an appointment.</p>	<p>A new list of results appears, explained in the "No Thank You" response table.</p>

No, thank you..., Calls

Result	Instructions	What Happens Next
<p>Patient doesn't want to be seen at all – condition resolved/untreatable</p> <p>The patient believes the reason for the call isn't an issue any more.</p>	<p>Depending on the situation, this may be a reasonable response or it may not. For example, if the patient is due for a cataract check, and their cataracts were removed at their winter home, but they still want to be seen by your practice, then this is the best response.</p> <p>If they have glaucoma and just don't want to come in again, however, be sure to warn the patient about the possible consequences of this decision. Glaucoma and diabetes can cause permanent loss of vision, and the office cannot take responsibility if the patient refuses to visit.</p>	<p>The patient will be taken off the call list and put on a report of patients who refused care. The office will then determine whether further warnings are necessary to cover legal exposure. For instance, the office may choose to send certified letters to these patients, explaining that they can no longer take responsibility for the health of their eyes, etc.</p>
<p>Patient doesn't want to be seen for now -- Maybe later</p> <p>Patient has lost insurance or has some medical condition or other issue that takes priority.</p>	<p>Be sure to note the reason the patient can't schedule now, and let them know when you will try back.</p>	<p>The patient will come off the list until the time you indicate to try again.</p>
<p>Patient doesn't want to be seen here – seen by other doctor</p> <p>The patient has chosen another doctor at another clinic.</p>	<p>Ask why they chose not to come back and get the details into the notes. If “you don't take my insurance anymore,” get the name of the insurance into the notes. If an offense, ask who and what.</p>	<p>The patient will be permanently removed from the call list.</p>
<p>Moved Away</p> <p>The patient no longer lives in the area or has moved to an unknown location.</p>		<p>The patient is taken off the call list so no one else will call them.</p> <p>The patient will show up on a special report listing patients with bad addresses, until the patient record is updated in the practice management system.</p>
<p>Deceased</p> <p>The patient has died. If possible, ask for a death date and enter this in the notes.</p>		<p>The patient is taken off the call list so no one else will call them.</p> <p>The patient will show up on a special report listing deceased patients, until the patient record is updated in the practice management system.</p>
<p>Stop Calling Me</p> <p>The patient asked that you never call again to request an appointment.</p>		<p>The patient is taken off the call list so no one else will call them. (See tips on dealing with irate patients)</p>

Dealing With Irate Patients

Some patients will respond negatively when you call. They may have already received a message and deliberately ignored it. When you contact these patients, they may say something like, “You already called me. I don’t want an appointment. Don’t call me again.” The patient may even claim that you’ve called three times already, or that they told you not to call. Often, these statements aren’t true. The contact history will give you a complete and accurate record of any prior calls. You might use this information to respond to an irate patient like this:

“I’ll be happy to make sure that no one here calls you again, if that’s what you’d like. Let’s review the call log and see what happened, because we try not to ever contact anyone after they’ve told us they don’t want an appointment. I see that Mary left a message two weeks ago, but no one has yet spoken to you directly. Is that right? Please understand that we’re trying to make sure you receive proper treatment for your eyes and eyesight. I see here that you have glaucoma. If untreated, glaucoma can cause blindness. Are you seeing another doctor?”

If the patient declines the appointment, be sure to record a summary of your conversation including any warnings about the possible consequences, when you record the results. This provides valuable documentation should the patient or his family later sue the practice for failing to treat his condition.

Stats and Lookup

These screen shots show how the *Stats chart* will look and how the format of the *Look Up* Screen. These icons are found on the bottom right hand corner of the caller screen.

Call results

Results for last 7 day(s)

Count	Result
Appointments	
0	made while calling
0	made from callbacks
1	not counted
0	1st kept
0	2nd+ kept
Calls	
11	busy or no answer
5	messages left
Totals	
0	patients reactivated
17	calls
0	skipped (no call made)
0.0%	conversion rate

Go

Patient Look Up

Find Patient

Name: Like

Name	Call time
Dolores Carter	11:09
Melissa McElroy	11:09
Brian Bennett	11:09
Stephanie Young	11:09
Ronald James	11:09
Joan Lewis	11:09
Michele Scott	11:08
Ronald Gilliam	11:08
Raymond Armstr...	10:30
Janet Wagner	10:30

Go

View Call Statistics

Special Shortcuts & Instructions

- 1. Quick Look Up Feature:** When a name comes on the screen, Brevium automatically copies the patient's record number to the clipboard (no need to highlight and copy manually). This makes it easy to look up the patient in your practice management system. Simply open your practice management system, go to the section where you would normally look up a patient by their record number, place your cursor in this field and either perform "ctrl v" or "right click" and select "paste". This will automatically paste the record number in the field making it easy to find the patient. The vast majority of practice management systems support this feature, but a few do not.
- 2. More than one patient on the screen:** When Brevium finds a patient who is overdue, it will check the database to see if there are other patients who share the same phone number. In most cases it will find spouses and family members. Brevium will put the names of these other patients on the screen. The idea being, if you are calling one patient you might as well know there are others with the same phone number. If you look closely at the record you will see the status of the additional patients—some might be overdue and need to be invited back, some might already be on the schedule, while others might have a pending recall or just aren't due for care. Whatever the status of the other patients, feel free to take whatever action you feel is most appropriate as it relates to keeping them compliant with their eye exams and recording the result of the call. The Brevium software will lead you through how to record different results for multiple patients. (ie you call patient #1 and schedule them, and leave a message for patient #2)
- 3. Brevium doesn't put anything back into your practice management system.** If you enter a note in the Brevium caller program it will not automatically go into the patients record in your practice management system. The only way Brevium gets its content is by pulling it from the practice management system. This means if you mark a patient as "deceased" in Brevium, you should also go into the patient record in the practice management system and mark the patient as "deceased" there. If you only mark the patient as "deceased" in Brevium, Brevium will keep track of it so the patient isn't called again, but for the purpose of keeping your records clean and up to date, make sure you go into the patient record and update it there as well. The same instruction applies to situations where you find a patient has moved or a patient has changed phone numbers.
- 4. Office Coordination:** When you start making Brevium calls make sure the rest of the office knows about the initiative. This is important because as you leave messages for patients they will start calling back to get on the schedule and you want the staff taking the call to know why the patient is calling back.
- 5. What does the "?" mean if I see it on the caller screen?** In some instances the practice administrator may configure Brevium to pull patients from an inactive doctor (or even an active doctor) to see a provider the patient hasn't seen before. When this happens Brevium will place a "?" in front of the name of the new doctor. This is a reminder to you as the caller that the patient might have a question about the doctor with which you are going to recommended they schedule . Ask your manager about how to handle this when you see it. Some recommended verbiage follows:

Special Shortcuts & Instructions, Cont'd

Hello, Ms Jones! This is Sarah calling from Best Eye Clinic. I'm calling because Dr Jones wanted me to call and let you know it's time to schedule your eye exam.

When would be the best time for you?

He is recommending I ask you to see Dr Smith, with whom he works hand in hand, because Dr Smith is in the best position to provide the type of eye exam you need (alternate verbiage would be to say "because Dr Jones is booked out so many weeks in advance").

This is simply an invitation. If the patient says, they prefer to see Dr Jones, go ahead and schedule the patient with the doctor who makes the most sense.

6. **What if I disagree with the doctor and location the Brevium Caller says the patient is due to come back for?** Either speak with your manager or use your best judgment about what is best for the patient. The Brevium Caller program is Brevium's best recommendation based on who the patient has seen in the past, where they have been seen, and the way your administrator has configured the types of call you are making.

Documenting the call back timing

No prior contact with this patient.

Wait a while

801-281-0967

Call back after: 6 months 😊

Why is care being deferred?

Examples:
3 weeks, 4pm, jan 5,
4/14, 2 hrs, 1 month

801-842-2870

Ok

Above is a screen shot showing how to document when to call a patient back. The smiley face shows up if the system understands your shorthand. Examples of acceptable entries are shown below the "call back after" box.