

perfect**serve**[®] 

How does it work?

- When the originator is calling through the Perfect Serve system, they would answer a series of questions based on that provider's needs as programmed in our rules engine.
- Once the Perfect Serve platform identifies who is on-call and that they do wish to receive a text message, the caller gets transferred to the **live transcription agent**.

- **This role is the ONLY non-automated component in a Perfect Serve transaction.** Therefore, it's critically important that the service provided in by the text agents is of the highest quality.
- In addition, the messages you will be transcribing and ultimately sending to a provider, will have a direct impact on patient care. So, as we go through the training you'll hear it said many times, how **important confirmation, accuracy, and quality is in this role.**



Section 1: Interface Overview

Text Messaging Application - 3.70.0 - (User: ags.avelterrain Workstation: PSKNOXCTXVDA02 Server: psknnoxscs4b)

File Help

USER INFORMATION

User's Name: Gender:

Phonetic Spelling:

Call ID	Duration	State	Caller
1004022661	00:01:37	ACD - Assigned: bsolomon	bsolomon

My Status:

CALLER INFORMATION

Caller Type: Hospital Name:

GREETING

TEXT MESSAGE

Third Attempt

File Help

USER INFORMATION

User's Name: Kapoor, Rajeev, MD Internal Medicine Gender: M

Phonetic Spelling: Nothing specified

Call ID	Duration	State	Caller
1004022661	00:01:37	ACD - Assigned: bsolomon	bsolomon

My Status:

CALLER INFORMATION

Caller Type: Nurse Hospital Name:

GREETING

Hi, May I have your message beginning with YOUR NAME?

TEXT MESSAGE

Callback Number: 877-844-7727 Message From: kayley

Patient First Name: Patient Last Name:

Reason: No PHI

Third Attempt

25 of 200 characters

File Help

USER INFORMATION

User's Name: Kapoor, Rajeev, MD Internal Medicine Gender: M

Phonetic Spelling: Nothing specified

Call ID	Duration	State	Caller
1004022661	00:01:37	ACD - Assigned: bsolomon	bsolomon

My Status: Taking Text Message

CALLER INFORMATION

Caller Type: Nurse Hospital Name:

GREETING
Hi, May I have your message beginning with YOUR NAME?

TEXT MESSAGE

Callback Number: 877-844-7727 Message From: kayley

Patient First Name: Patient Last Name:

Reason: No PHI

Third Attempt

877-844-7727 FROM: KAYLEY

25 of 200 characters

- User Information
 This area contains details about who will receive the Voice-to-Text interaction.

- Caller Information
 This area contains information about the caller type and the hospital name (if available).

Greeting

HI. THIS IS: _____ MAY I HAVE YOUR NAME PLEASE

(Something that the caller will understand)

If you are asked for your last name you will provide them with the initial.

Preview of message.

Text Messaging Application - 3.70.0 - (User: ags.avelderrain Workstation: PSKNOXCTXVDA04 Server: psknnoxscs4b)

File Help

USER INFORMATION

User's Name: Shapiro, Deborah G, MD Internal Medicine Gender: F

Phonetic Spelling: Nothing specified

Call ID	Duration	State	Caller
3004821003	00:02:05	ACD - Assigned: ags.avelderrain	ags.avelderrain

Pickup Mute My Status: Taking Text Message Disconnect

CALLER INFORMATION

Caller Type: Patient Hospital Name:

GREETING

TEXT MESSAGE

Callback Number 201-370-5858 Message From ptn

Hospital Patient First Name

Patient Last Name Date of Birth July 19, 1986

Reason No PHI re:

Third Attempt

Send Message

201-370-5858 FROM: PTN UR

64 of 8192 characters

Add Repeating Questions

Cancel

Voice-to-Text Forms and Fields

- What information you must gather depends on what form is loaded when the call is answered.

The screenshot displays a software interface for a text messaging application. At the top, the window title is "Text Messaging Application - 3.70.0 - (User: ags.avelderrain Workstation: PSKNOXCTXVDA04 Server: psknoxscs4b)". The interface is organized into several sections:

- USER INFORMATION:** Includes fields for "User's Name" (Ivy, Jennifer, CNM), "Obstetrics Gynecology", "Gender" (F), and "Phonetic Spelling" (Nothing specified). Below this is a table with columns for Call ID, Duration, State, and Caller.
- CALLER INFORMATION:** Includes "Caller Type" (Nurse) and "Hospital Name" (Orlando Health - Winnie Palmer Hospital for Women and Babies).
- GREETING:** Displays the text "Hi, May I have your message beginning with YOUR NAME?".
- TEXT MESSAGE:** A form with fields for "Callback Number" (321-843-8128), "Message From", "Patient First Name", "Patient Last Name", and "Reason" (No PHI).
- Bottom Section:** Contains a "Third Attempt" checkbox, a "Send Message" button, a text area with "321-843-8128 WPH TRIAGE", a character count "23 of 200 characters", and "Add Repeating Questions" and "Cancel" buttons.

A large black bracket on the left side of the screenshot encompasses the "TEXT MESSAGE" section and the bottom section, indicating the information gathered during the call.

Forms

Characteristics of forms:

- Variety.
- Reading (All caps like BUN is spelled, otherwise it's read)
- Won't always know what you're asking for, that's ok.
- Importance of information.

The screenshot displays a software interface with the following sections:

- USER INFORMATION:** Includes fields for 'User's Name' (Kapoor, Rajeev, MD), 'Internal Medicine', and 'Gender' (M). A 'Phonetic Spelling' field is set to 'Nothing specified'. Below this is a table with columns: Call ID (1004022661), Duration (00:01:37), State (ACD - Assigned: bsolomon), and Caller (bsolomon). There are 'Pickup' and 'Mute' buttons, a 'My Status' dropdown menu (set to 'Taking Text Message'), and a 'Disconnect' button.
- CALLER INFORMATION:** Includes 'Caller Type' (Nurse) and 'Hospital Name' fields.
- GREETING:** A text prompt: 'Hi, May I have your message beginning with YOUR NAME?'
- TEXT MESSAGE:** Includes 'Callback Number' (877-844-7727), 'Message From' (kayley), 'Patient First Name', 'Patient Last Name', and 'Reason' (No PHI).
- Bottom Section:** A 'Third Attempt' checkbox, a 'Send Message' button, a text input area containing '877-844-7727 FROM: KAYLEY', a character count '25 of 200 characters', an 'Add Repeating Questions' button, and a 'Cancel' button.

- Each form has its own set of informational fields that will load when the call is answered. Fields allow you to enter information for the message that will be sent.

File Help

USER INFORMATION

User's Name: Kapoor, Rajeev, MD Internal Medicine Gender: M

Phonetic Spelling: Nothing specified

Call ID	Duration	State	Caller
1004022661	00:01:37	ACD - Assigned: bsolomon	bsolomon

My Status: Taking Text Message

CALLER INFORMATION

Caller Type: Nurse Hospital Name:

TEXT MESSAGE

Callback Number 877-844-7727 Message From kayley

Patient First Name Patient Last Name

Reason No PHI

- As you enter information into these fields, the display window will be updated.

Third Attempt

Send Message

877-844-7727 FROM: KAYLEY

25 of 200 characters

Add Repeating Questions

Cancel

Text Messaging Application - 3.70.0 - (User: ags.avelderrain Workstation: PSKNOXCTXVDA02 Server: psknocs4b)

File Help

USER INFORMATION

User's Name: Rheum Admin - Ashany, Chan, Whitman, Meng, Parrish **Gender:** U

Phonetic Spelling: Nothing specified

Call ID	Duration	State	Caller
3004908305	00:03:03	Disconnected [Remote Disconnect]	ags.avelderrain

My Status: Text Message Wrapup Disconnect

CALLER INFORMATION

Caller Type: Patient **Hospital Name:**

GREETING

Hi, May I have your message beginning with YOUR NAME?

TEXT MESSAGE

Callback Number: 347-639-0035 **Message From:** PTN

Hospital: **Patient First Name:**

Patient Last Name: A **Date of Birth:**

Reason: **No PHI** RE: PTN HAS APPT ON AUGUST 20TH NEEDS TO RESCHEDULE TO NOVEMBER 5TH

Third Attempt

124 of 8192 characters

Send Message Add Repeating Questions Cancel

Text Messaging Application - 3.70.0 - (User: ags.avelderrain Workstation: PSKNOXCTXVDA02 Server: psknocs4b)

File Help

USER INFORMATION

User's Name: Gupta, Garima, MD **Gender:** F

Phonetic Spelling: Nothing specified

Call ID	Duration	State	Caller
3004835219	00:02:44	Disconnected [Remote Disconnect]	ags.avelderrain

My Status: Text Message Wrapup Disconnect

CALLER INFORMATION

Caller Type: **Hospital Name:**

GREETING

Hi, May I have your message beginning with YOUR NAME?

TEXT MESSAGE

Callback Number: 260-266-1700 **Message From:** tom

Hospital or Facility: heartfield **Patient First Name:**

Patient Last Name: **Date of Birth:**

Room Number: 32 er **Requesting Provider:**

BUN: 51 **Creatinine:** 3.4

Potassium: 4.7

Reason for Consult: **No PHI** re: ptn was sent here for nephrology consult, returning call as asked

Third Attempt

226 of 8192 characters

Send Message Add Repeating Questions Cancel

Text Messaging Application - 3.70.0 - (User: ags.avelderrain Workstation: PSKNOXCTXVDA04 Server: psknocscs4b)

File Help

USER INFORMATION

User's Name: Chaudhri, Nadia, MD Nephrology Gender: F

Phonetic Spelling: Nothing specified

Call ID	Duration	State	Caller
3004941364	00:00:23	ACD - Assigned: ags.avelderrain	ags.avelderrain

My Status: Taking Text Message

CALLER INFORMATION

Caller Type: Patient Hospital Name:

GREETING

Hi, May I have your message beginning with YOUR NAME?

TEXT MESSAGE

Callback Number w/Ext 240-793-6061 **From First Name** _____
From Last Name _____ **Hospital or Facility** _____
Patient First Name _____ **Patient Last Name** _____
Date of Birth January 01, 1850 **Patient's Kidney Doctor** _____
If Lab. REF # _____
Reason No PHI _____

Third Attempt 240-793-6061 DOB: 1/1/1850 26 of 8192 characters

Text Messaging Application - 3.70.0 - (User: ags.avelderrain Workstation: PSKNOXCTXVDA04 Server: psknocscs4b)

File Help

USER INFORMATION

User's Name: Shapiro, Deborah G, MD Internal Medicine Gender: F

Phonetic Spelling: Nothing specified

Call ID	Duration	State	Caller
3004821003	00:02:05	ACD - Assigned: ags.avelderrain	ags.avelderrain

My Status: Taking Text Message

CALLER INFORMATION

Caller Type: Patient Hospital Name:

GREETING

Hi, May I have your message beginning with YOUR NAME?

TEXT MESSAGE

Callback Number _____ **Message From** ptn _____
Hospital _____ **Patient First Name** _____
Patient Last Name _____ **Date of Birth** _____
Reason No PHI re: _____

Third Attempt 201-370-5858 FROM: PTN 64 of 8192 characters

File Help

USER INFORMATION

User's Name: Kapoor, Rajeev, MD Internal Medicine Gender: M

Phonetic Spelling: Nothing specified

Call ID	Duration	State	Caller
1004022661	00:01:37	ACD - Assigned: bsolomon	bsolomon

My Status: Taking Text Message

CALLER INFORMATION

Caller Type: Nurse Hospital Name:

GREETING

Hi, May I have your message beginning with YOUR NAME?

TEXT MESSAGE

Callback Number: 877-844-7727 Message From: kayley
 Patient First Name: Patient Last Name:
 Reason: No PHI

Third Attempt

877-844-7727 FROM: KAYLEY

25 of 200 characters

- **Required:** information must be entered on all required fields before you can send a message.

The send button will remain grayed out until all required fields are completed.

If the caller is unable to provide the required information, type: "Not Provided" or "na" in the applicable field.

Please type: information provided on the message field and specify.

If a patient is calling:
you must type PTN (patient) on the message from field.



GREETING
Hi, May I have your message beginning with YOUR NAME?

TEXT MESSAGE

Callback Number 347-639-0035

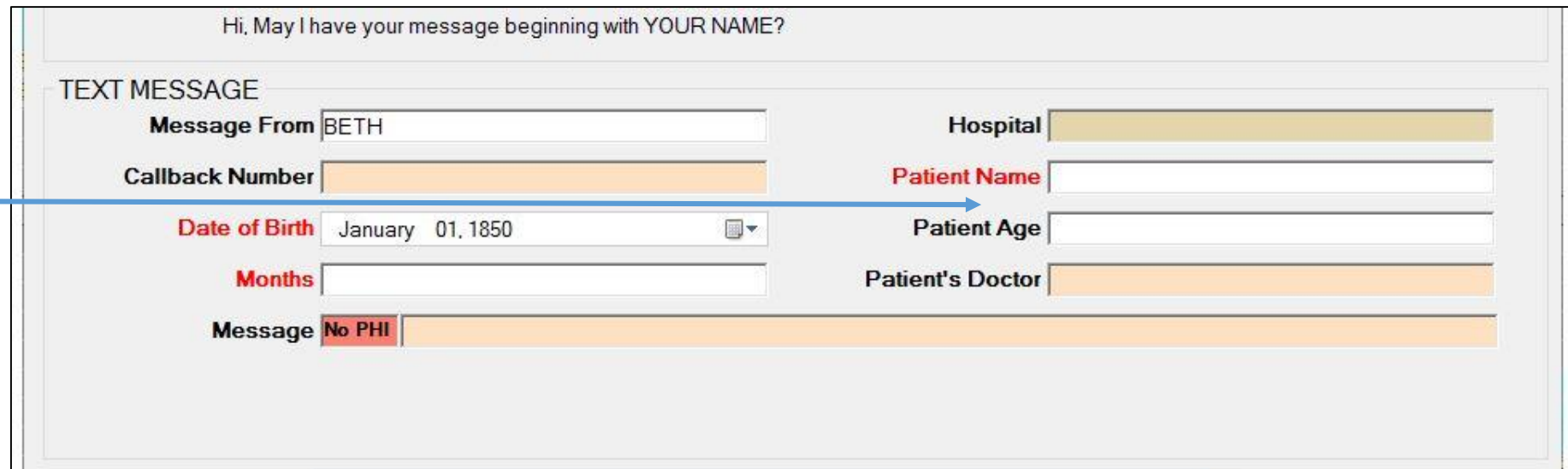
Hospital

Message From PTN

Patient First Name

A blue arrow points from the top right towards the 'Message From' field.

Some forms will only ask for patient name, you should type both first and last name of the patient.



Hi, May I have your message beginning with YOUR NAME?

TEXT MESSAGE

Message From BETH

Callback Number

Date of Birth January 01, 1850

Months

Message No PHI

Hospital

Patient Name

Patient Age

Patient's Doctor

A blue arrow points from the text on the left towards the 'Patient Name' field.

TEXT MESSAGE

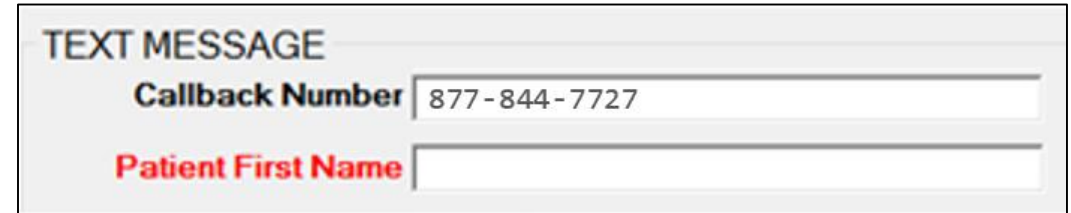
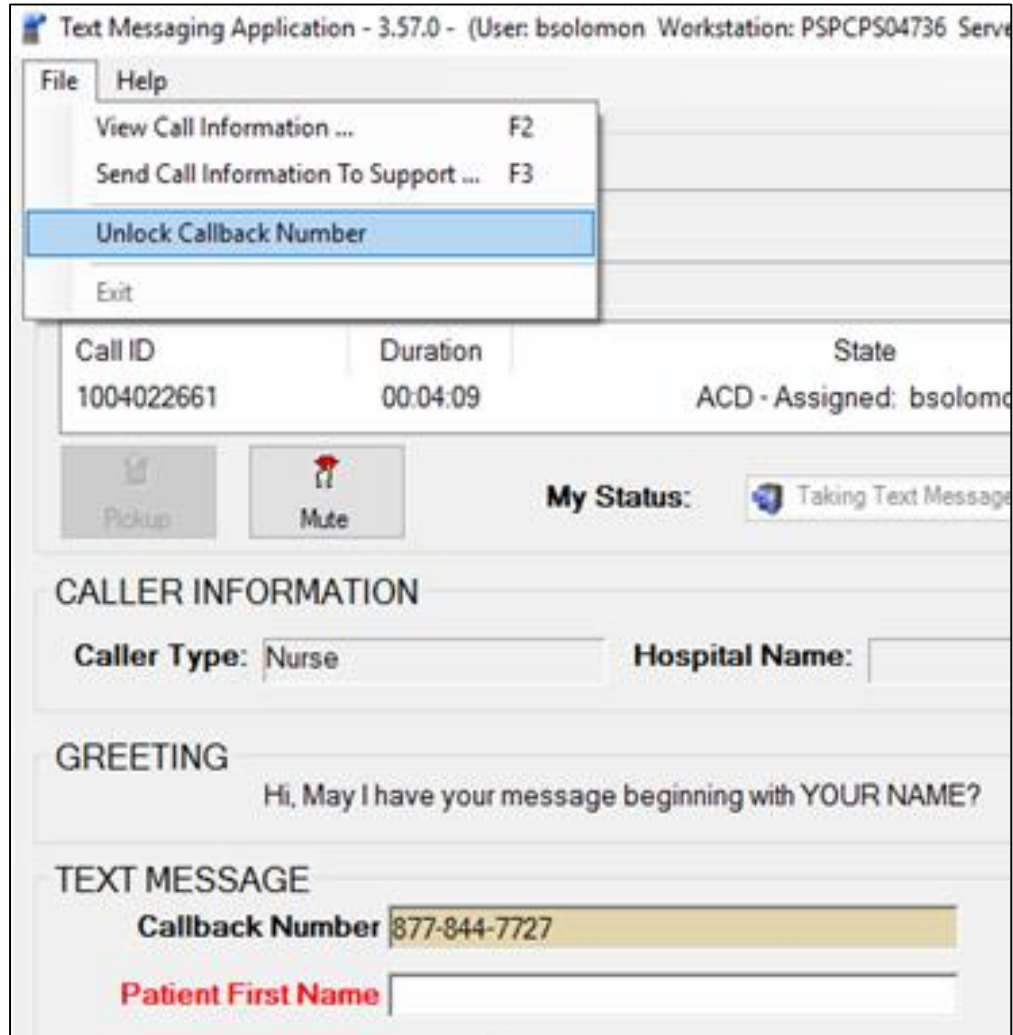
Callback Number	877-844-7727	Message From	kayley
Patient First Name		Patient Last Name	
Reason	No PHI		

We HAVE to confirm the callback number
ON EVERY SINGLE CALL.

In case of being necessary to contact the patient or the caller we need to make sure we have the right phone number.

If we are not given a callback number we cannot send the message.

Unlocking a Callback Number



- **Locked:** the locked fields will not allow you to manipulate the information. Locked fields are tan in color.
 - o Hospital Name
 - o Callback Number
- To unlock: File> Unlock
Callback Number
If you manipulate callback number, you must confirm it!

Call blocking features

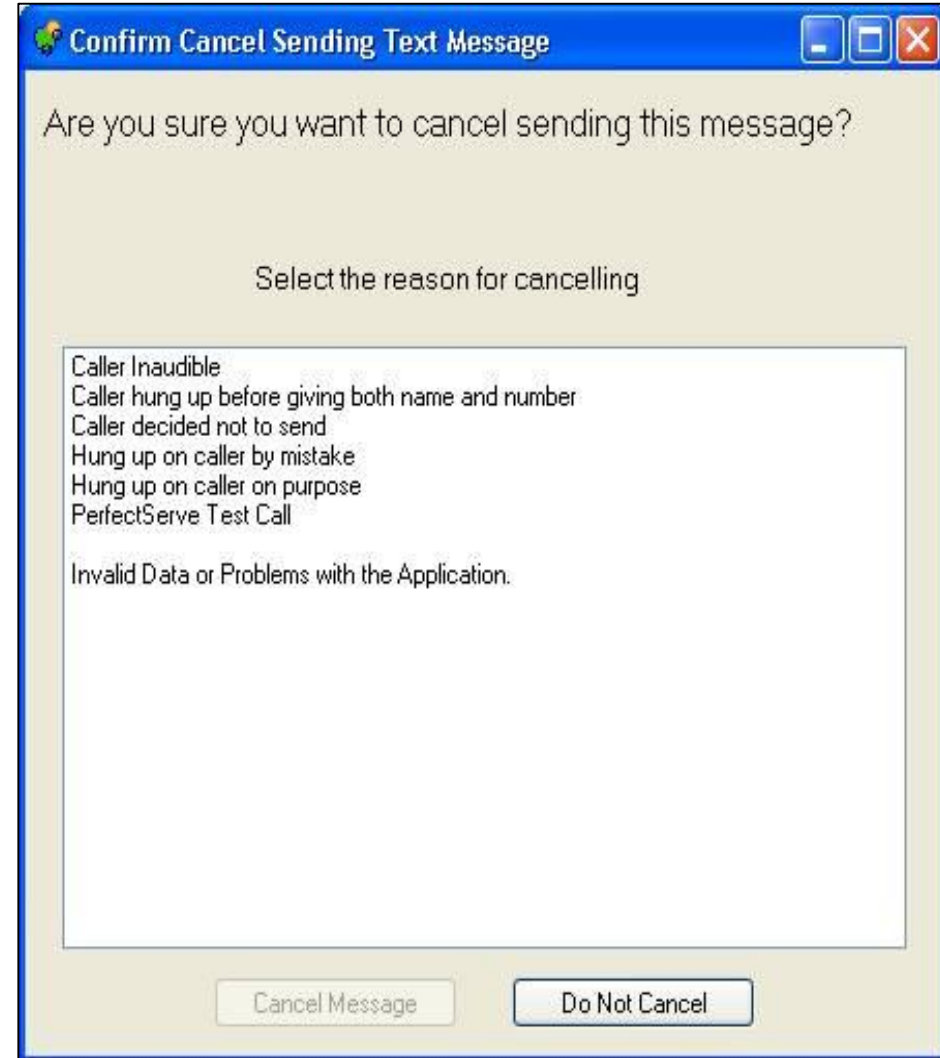
When we have a patient calling and leaving a message we must ask them to please remove any call blocking features, to assure they will receive the call.

“Please, remove any call blocking features since you might get a callback from a block or unknown number.”

GREETING	
Hi, May I have your message beginning with YOUR NAME?	
TEXT MESSAGE	
Callback Number	347-639-0035
Hospital	
Message From	PTN
Patient First Name	

Canceling a Message

Try to choose the closest reason for canceling a message. These responses will be used to track message cancellations so it is important that your response accurately reflects the reason a message wasn't sent.



Section 2: Interacting with a Caller

Greeting

- *“Hi. This is _____ May I have your name please.”*
 - This will help you take control of the call.
 - If the first field is Caller Name, try to use their name on the call. This creates a more personal atmosphere on the call.

Transcribing Accurate Messages from Caller

- Ask the caller to spell difficult medical terms or go to Google and look up the spelling of the term.
- DO NOT TYPE “Please call” or “Caller Needs to Speak with you”, unless the caller specifically states they need a callback.

PHI in the Reason Field

- Reason field should not contain PHI. HIPAA rules and regulations mandate that no unsecure device can receive PHI. As a result, our system will remove any field in the text form that is considered PHI automatically. However, the reason field is never considered. Keeping PHI out of the reason field is a manual process. As a reminder, the reason field will say “No PHI” as seen below.

Callback Number	<input type="text"/>	Message From	<input type="text"/>
Hospital	<input type="text"/>	Patient First Name	<input type="text"/>
Patient Last Name	<input type="text"/>		
Reason	No PHI		<input type="text"/>

Do not enter any of the following in the REASON field:

1. Patient's Name
2. Medical Record Number
3. Patient's email address
4. Financial Account Numbers
5. Social Security Numbers
6. Date of Birth
7. Identifying relationships (son, mom, brother, uncle, etc.)
8. Reference number or specimen number (related to patient)
9. Patient's phone number

To simplify, **ANY information that could be used to identify someone is PHI. Any information you are not sure about should be treated as PHI.** Our application is designed to securely transmit PHI through our application and to screen out PHI when transmitting to a non-secure device. In order for this process to work you must never enter PHI into any field marked “No PHI”.

The form contains the following fields:

- Callback Number:
- Message From:
- Patient Last Name:
- Requesting Doctor:
- Hospital or Facility:
- Patient First Name:
- Room Number:
- Reason for Consult: (This field is highlighted with a red border)
- Need Callback:

If patient is the caller, you must type PTN (patient) on the *message from* field.

It is perfectly acceptable to put PHI into the **other fields** as **our system will remove this information when the message is viewed via a non-secure device.** You may at times be asked to include PHI in a message and if needed, you can place this information after the patient's last name. Just add some space and then indicate what the information is regarding. For example

Callback Number	865-555-1212	Hospital or Facility	St Somewhere
Message From	John	Patient First Name	Ima
Patient Last Name	Sickman DOB: 01/01/2001	Room Number	1B
Requesting Doctor	Feelgood		
Reason for Consult	No PHI Ptn needs to have chart updated and new medication ordered		
Need Callback	YES		

865-555-1212, Facility: St Somewhere, From:
John, Patient Name Ima Sickman DOB:
01/01/2001, Requesting Dr: Feelgood,
Reason: Ptn needs to have chart updated
and new medication ordered, Callback Req:
YES

In the message shown above the date of birth of the patient was securely included by placing it after the last name of the patient.

The message will appear differently when viewed over a secure or non-secure device as shown below. It is always best to treat it as PHI rather than assume it is not if you are unsure.

865-555-1212, Reason: Ptn needs to have
chart updated and new medication ordered,
Callback Req: YES

Date of Birth

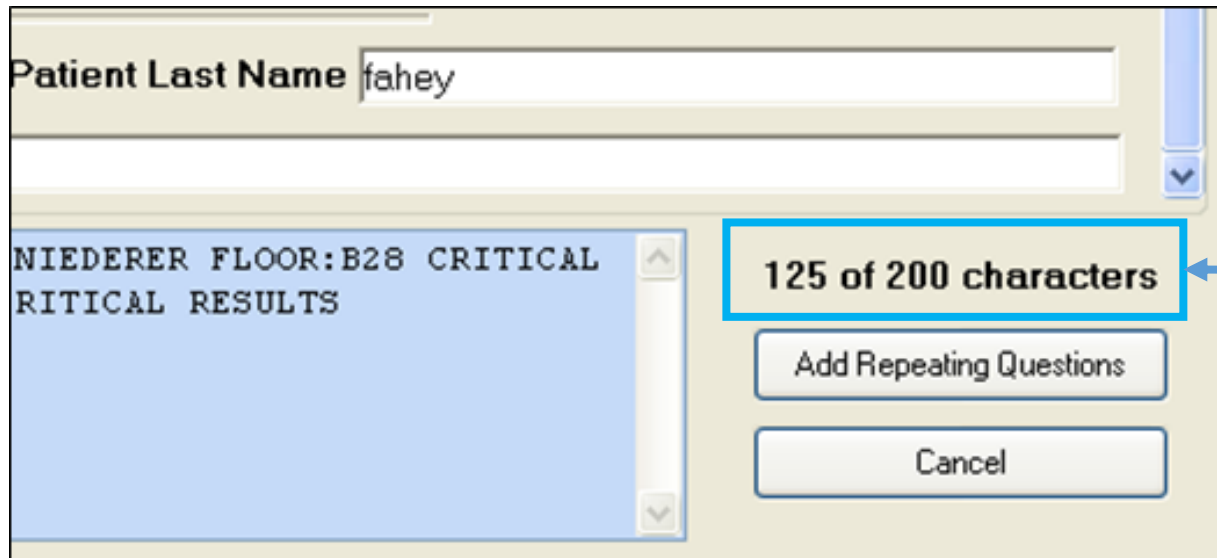
- As indicated above, Date of Birth is a form of PHI and should only be included in the field dedicated to DOB or in the Patient Name field as a last resort.
- When the text form requests date of birth and the caller does not know it, please add date of birth as **1/1/1899**.
- If not given DOB or any other information please notate on message field. Ex. DOB not provided.
- ***DOB MUST BE CONFIRM BACK TO THE CALLER***

Confirm Spelling

- **PATIENT NAME – ASK FOR SPELLING OF ALL NAMES**, even if simple. Ex., John can be spelled John or Jon
- **Doctor Names**
- Medical terms or any other words if spelling unknown
 - Use Google to look up spelling of words or medical terms
 - Use most “Common Spellings” list furnished by Perfect Serve
 - Ask caller if not familiar with term. Avoid asking patients to spell medical terms
- Check spelling for entire message before sending.
- For letters easily mistaken like PT, MN, DZBPV, use the phonetic alphabet to confirm spelling.

Abbreviations

Due to limited input capability of the various devices, abbreviations are required on occasion in order to compose a complete message.



The screenshot shows a software interface for composing a message. At the top, there is a text field labeled "Patient Last Name" containing the text "fahey". Below this is a large text area containing the message content: "NIEDERER FLOOR:B28 CRITICAL" and "RITICAL RESULTS". To the right of the text area, a blue box highlights the text "125 of 200 characters". Below this box are two buttons: "Add Repeating Questions" and "Cancel". A blue arrow points from the text "125 of 200 characters" to the right.

Characters

You have a limited amount of characters for the message, keep an eye on this during the call.

Text Messaging Application - 3.70.0 - (User: ags.avelderrain Workstation: PSKNOXCTXVDA02 Server: psknocs4b)

File Help

USER INFORMATION

User's Name: Scott, Ronald, MD Pulmonary Disease Gender: M

Phonetic Spelling: rahnohld scaht

Call ID	Duration	State	Caller
3004828664	00:02:39	ACD - Assigned: ags.avelderrain	ags.avelderrain

My Status: Text Message Wrapup

CALLER INFORMATION

Caller Type: Healthcare Provider Hospital Name:

Message From: cherlyn

Patient Last Name: [REDACTED]

edule delivery, wondering if there is another phone number to contact ptn

Third Attempt

Send Message

844-215-4264 FROM: CHERLYN [REDACTED] RE: WE RECEIVED OXYGEN ORDER FOR PTN BUT HAD NOT BEEN ABLE TO CONTACT PTN TO SCHEDULE DELIVERY, WONDERING IF THERE IS ANOTHER PHONE NUMBER TO CONTACT PTN

201 of 200 characters

Add Repeating Questions

Cancel

Too Many Characters

There is not enough room to add information for Reason.

Please remove the appropriate number of characters and try again.

1 Character(s) can not be displayed.

OK

Is not allowed to send a message that exceeds the character limit , so you may have to abbreviate at times in order to keep this count from exceeding the maximum allowed for delivery.

Text Messaging Application - 3.70.0 - (User: ags.avelderrain Workstation: PSKNOXCTXVDA02 Server: psknnoxcs4b)

File Help

USER INFORMATION

User's Name: Scott, Ronald, MD Pulmonary Disease Gender: M

Phonetic Spelling: rahnohd scaht

Call ID	Duration	State	Caller
3004828664	00:02:39	ACD - Assigned: ags.avelderrain	ags.avelderrain

My Status:

CALLER INFORMATION

Caller Type: Healthcare Provider Hospital Name:

GREETING

Hi, May I have your message beginning with YOUR NAME?

TEXT MESSAGE

Callback Number: 844-215-4264 Message From: cherlyn
 Patient First Name: Patient Last Name:
 Reason: No PHI received oxygen order but had not been able to contact ptn to schedule delivery, wondering if there is another phon

Third Attempt

187 of 200 characters

844-215-4264 FROM: CHERLYN RE [REDACTED] RECEIVED OXYGEN ORDER BUT HAD NOT BEEN ABLE TO CONTACT PTN TO SCHEDULE DELIVERY, WONDERING IF THERE IS ANOTHER PHONE NUMBER TO CONTACT PTN

When the message is longer than the character limit you will need to work with the caller to shorten the message.

Feel free to work with the caller, let them know that you have a limited space for the message.

GREETING
Hi, May I have your message beginning with YOUR NAME?

TEXT MESSAGE

Callback Number 773-884-1749 **Message From** denisse

Patient First Name tara **Patient Last Name** buirst room 547 bed 2

Reason No PHI please consider making ptn full admission

Patient First Name **Patient Last Name**

Reason No PHI

Third Attempt

773-884-1749 FROM: DENISSE RE: TARA BUIRST ROOM 547 BED 2 PLEASE
CONSIDER MAKING PTN FULL ADMISSION

100 of 200 characters

When the caller needs to send more than one message we can add a secondary or even third patient by clicking on **ADD REPEATING QUESTIONS**.

CHANGE

92 of 500 characters

Add Repeating Questions

Cancel

Managing Accents

- Talking over the phone with someone whose accent is difficult for you to understand, creates potential for misunderstanding and miscommunication. It's very common to talk with someone whose native language is different than your own, but it is necessary to be able to navigate phone conversations with anyone who calls. The following tips will help you effectively communicate with someone over the phone, as we cannot rely on the visual cues we would get in a face to face conversation.
- **Don't Pretend to Understand:** It's okay to gently explain you are having difficulty understanding them. One of the least effective things you could do is pretend to understand, when you don't. It's perfectly acceptable to say, "I apologize. I am having trouble understanding you. Let's slow down and try again." That's the most important thing to the caller with an accent, knowing you want to help and get it right. They're aware you might be having difficulty. If you pretend you understand, it won't help the situation at all. Your tone of voice is international and universal. So keep it at a light, slower pace, and smile. A smile can be heard in any language.
- **Don't Rush:** Rushing threatens the best of us, let alone someone who is unable to express themselves in our style. Slow down, not to excess of course, but if you find yourself constantly saying "Uh huh," over and over in rapid succession, you're probably rushing the caller.

- **Don't Shout:** Persons with accents are not hard of hearing. Many times we subconsciously speak louder, repeat the same word over and over, thinking that will help. It doesn't. People with accents normally hear very well. It's insulting to shout at them. Keep that smile on your face. It'll show that you have the patience to help and keep trying to let them know you are there to help.
- **Don't Be Rude:** No one really thinks they're rude. But if you've ever said: "Hey, I can't understand you" or even a short, terse, "huh?" – You're considered rude. Simply explain that you're having a little difficulty understanding. They'll often repeat themselves for you. If the situation is hopeless and you simply aren't getting anywhere, don't be embarrassed or afraid to seek help.
- **Listen for key words:** Many times someone is calling with an issue or a question and they want to get it all out right away. As soon as you realize you can't understand them, you feel overwhelmed by just how much they are saying. **Don't panic!** Listen for a key word or phrase. For example, if you hear the phrase "job application" or "appointment" start there!
- **Ask yes or no questions based on those key words:** Direct the conversation by asking closed-ended questions based on the key words or phrases you picked out, even if it was only a few words. For example "Are you calling about a job application?" or "Are you calling about an appointment?" This step allows you to take the conversation into your own hands, instead of asking them to repeat everything they said over again (or maybe several times).
- **Use the Phonetic Alphabet:** The Phonetic Alphabet is a great way to help ensure the right information is given. It is useful to learn this alphabet as it can help make handling the call more effective and efficient.

Do Not Provide Medical Advice

- Perfect Serve Text Agents should never provide *any* medical advice or recommendations other than for the caller to call back through and listen to the prompts again to ensure they made the correct selection. The Text Agent's role is solely to transcribe the caller's message.
- Even if an associate possesses medical training, that associate should not provide *any* medical advice.



Angry Callers/ Complaint Calls

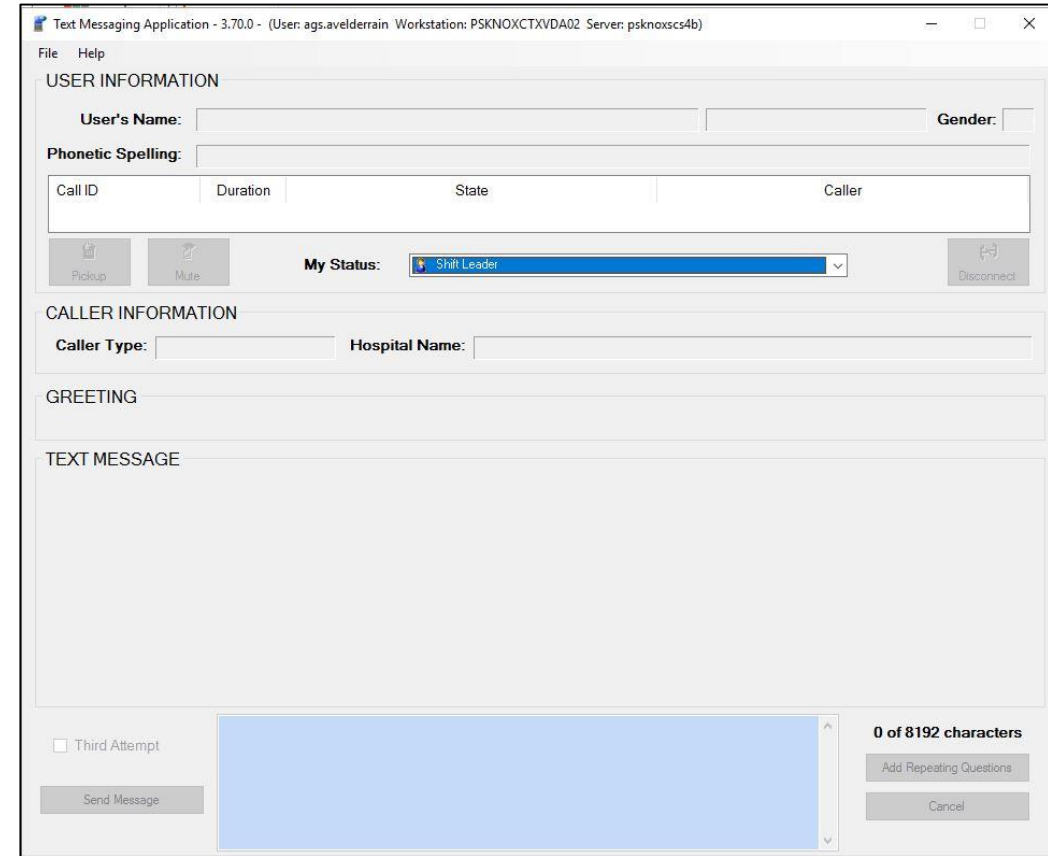
When dealing with an upset caller, we need to empathize with how they are feeling and not exacerbate the situation. We need to prepare ourselves each day for how to manage these types of calls. Never allow irritation or frustration to sound in your voice. Remain polite and professional, even if that is not how you feel inside. Make sure the caller knows you want to do everything you can to help and that you empathize with their situation.

If the caller says this is the **third time they call** or is the third message they send we must **check mark where it says third attempt.**



A screenshot of a form interface. On the left, there is a checkbox labeled "Third Attempt" which is currently unchecked. Below this checkbox is a grey button labeled "Send Message". To the right of the checkbox, there is a blue rectangular area containing the text "773-884-1".

If they mention they have call any other number of times we will type that on the message.



A screenshot of a software application window titled "Text Messaging Application - 3.70.0". The window contains several sections for data entry:

- USER INFORMATION:** Includes fields for "User's Name", "Gender", and "Phonetic Spelling".
- Table:** A table with columns for "Call ID", "Duration", "State", and "Caller".
- Buttons:** "Pickup", "Mute", and "Disconnect".
- My Status:** A dropdown menu currently set to "Shift Leader".
- CALLER INFORMATION:** Fields for "Caller Type" and "Hospital Name".
- GREETING:** A text input field.
- TEXT MESSAGE:** A large text area for composing a message.
- Bottom Bar:** Includes a "Third Attempt" checkbox, a "Send Message" button, a character count "0 of 8192 characters", and "Add Repeating Questions" and "Cancel" buttons.

Suicidal callers.

To help in situations with people that state that they are suicidal, please encourage them to call the suicide prevention line.

The number is 1-800-273-8255.

Please be as empathetic as possible with these types of callers, expressing concern while trying to get them to take the number. Advise them that you will be sending the message to the doctor but until they call back to call this number.

Closing a Call – Avoid Setting Callback Expectations

When finished with a call always say the following:

- ***“I’ve got your message. Goodbye.” or “Thank you for your message. Goodbye.”***
- DO NOT set caller expectations for physician callback. Do not tell the caller they should hear back from someone in 30 minutes or 45 minutes or any time frame for callback. Simply use the scripted closing and disconnect the call.
- If caller is insistent about when the message will be delivered, advice ***“I’m sorry, this is an offsite message transcription service. I cannot say when or if they will call you back. I have your callback number and message for.”***

Section 3: Caller Questions/Objections and Canned Responses/Closing

- **Questions regarding Office Information**
 - Voice-to-Text is a transcription service only and we do not perform screening.
 - Common office information inquiries are as follows:
 - Can I cancel an appointment?
 - Do you know when the office will be open?
 - Who's on-call?
 - Is (user) still with the practice?
 - Is (user) back from vacation?
 - What's the best time to reach (user)?
 - What are the office hours?
 - Is this doctor in the same practice with...?
 - What is the fax number?
 - Respond as follows to any office information queries:
- *"I'm sorry this is the message transcription service. I do not have that information. I can take a message for [Dr/Mr/Ms name] if you would like me to."*
- **Is my call really urgent?**
 - *"I'm sorry. You have reached a message transcription service. I can't help you make that decision. If in doubt, please hang up and call back, ensuring that you listen carefully to the options presented to you."*

- **Clients calling to retrieve messages, on call schedule changes, other issues requiring Perfect Serve Client Services**
 - *“I’m sorry but we are unable to transfer the call from this line. If the healthcare provider is not on call, please have them follow the appropriate channels to change the provider on call.”*
 - Client Services number should not be given out to patients.
- **Conferencing of physicians with other parties and requests to transfer any number**
 - *“I’m sorry. You have reached the message transcription service. I am unable to complete that request.”*

Calls to change the contacted user or information for the user.

“I’m sorry we are a transcription service and I am unable to make those changes. Please contact the Perfect Serve support center who will be able to assist you.”

If asked for a phone number please advise:

“I’m sorry, we are a transcription service and do not have that number. Your facility will have their contact information.”

If they continue to push for assistance:

“I’m sorry I am unable to assist with that, the only thing I am able to do is send a message to the person listed to receive the message. If you would not like to send a message I would have to disconnect the call.”

If they are the doctor/person listed:

Please repeat that the facility should have the contact information.

If after 2 attempts with the above they are still adamant about getting phone number or issue changed, advise:

“I’m sorry I am unable to assist with this situation and will have to disconnect the call.”

REMEMBER

- If the message is consult, **always ask for the reason** of the consult.
- when a doctor is mentioned during a message add the name of the dr. on it.
- When having a spanish call we must type ***“Spanish speaker”*** on the message.
- Reason caller gives is: “Please call” or “Caller Needs to Speak with you”, Please see if caller can provide additional information by asking *“Are there additional details you would like to provide to [Name of User]?”*
- Closing Call:
“I have your message, thank you for calling. Goodbye.”

REMEMBER

- Questions about:

-Office Hours -Fax Number -When will the Dr call back

-How soon until I hear from the physician

“I’m sorry. You have reached a transcription service. I don’t have that information. I have your call back information for Dr/Mr/Ms [Name] which will be sent with the message.”

- Caller wants to know if the provider received the last message:

“I’m sorry. You have reached a transcription service. I would be happy to send another message for you.”

- Conferencing of physicians with other parties and requests to transfer any number

“I’m sorry. You have reached a transcription service. I am unable to complete that request.”

REMEMBER

- Caller needs to change the provider who is on call:

“I am sorry but we are unable to change who the call goes to from this line. If the healthcare provider is not on call please have them contact perfect serve to make the change.”

- Confirming Patients callback numbers:

“If you have any call blocking features we ask that you remove them at this time as the provider on call may call back from a blocked or unknown number”

- How to remove call block features:

“I am sorry, you would need to check with your service provider on how to remove those features”

REMEMBER

- If the caller refuses to provide a callback number:
“In order for the physician to call you back we will need a callback number, otherwise I will have to cancel this message.”
- If there is no caller or silence on the other end of the phone:
“Hello Caller, I am unable to hear you please hang up and try your call again, Thank You.”
- If caller doesn't have some of the information, don't forget to put: not provided or na on the field and to type it on the message, ex: DOB not provided, pharmacy info not given.
- “Where are you located?”
“We are based out of phoenix” .

Section 4: Text Transcription Goals

- **There are several departmental goals we strive to maintain:**
 - 90% of all calls within 60 seconds
- **There are several personal goals each individual in the department is responsible for:**
 - Average time to answer = 4 seconds
 - Average time on a call = 65-70 seconds
 - Average after call wrap time = 4 or less seconds
- **Methods to reach these goals**
 - Answer the call immediately
 - Keep interaction limited by taking control of the call
 - Send message immediately after editing and checking for errors

Section 5: Telephone Etiquette

- **Focus on the caller**
- **Do not chew gum, eat or drink while speaking with caller**
- **Be professional**
 - Control speed, tone, and volume
 - Speak clearly
 - Smile
 - Be enthusiastic, confident, friendly, and attentive
 - Avoid slang

Workgroup Activation

Because of the rapid pace of Voice to Text calls, it is sometimes difficult for an agent to change from Available to non-Available states before the next call arrives. During these times agents may have to take themselves out of the Voice To Text Work Group long enough to prevent incoming calls, thereby allowing the agent to transition to a non-Available state such as Lunch or Break.

- Complete the current call, click Disconnect, but do not click the “SEND” button.

File Help

USER INFORMATION

User's Name: Gender:

Phonetic Spelling:

Call ID	Duration	State	Caller

My Status:

CALLER INFORMATION

Caller Type: Hospital Name:

GREETING

Callback Number	<input type="text" value="865-555-0000"/>	Message From	<input type="text"/>
Hospital or Facility	<input type="text" value="Fort Sanders"/>	Date of Birth	<input type="text" value="January 01, 1850"/>
Patient First Name	<input type="text"/>	Patient Last Name	<input type="text"/>
Room Number	<input type="text"/>	Requesting Doctor	<input type="text"/>
Reason for Consult	<input type="text" value="No PHI"/>		

Third Attempt

0 of 160 characters

Interaction Client [Server: psknxscs4b User: pgriffit Station: 8656033036]

File Actions Options Help

Interactions | R

Number: []

My Interaction

Queue

Number Duration State

Pickup Hold Transfer Voice Mail Disconnect Mute

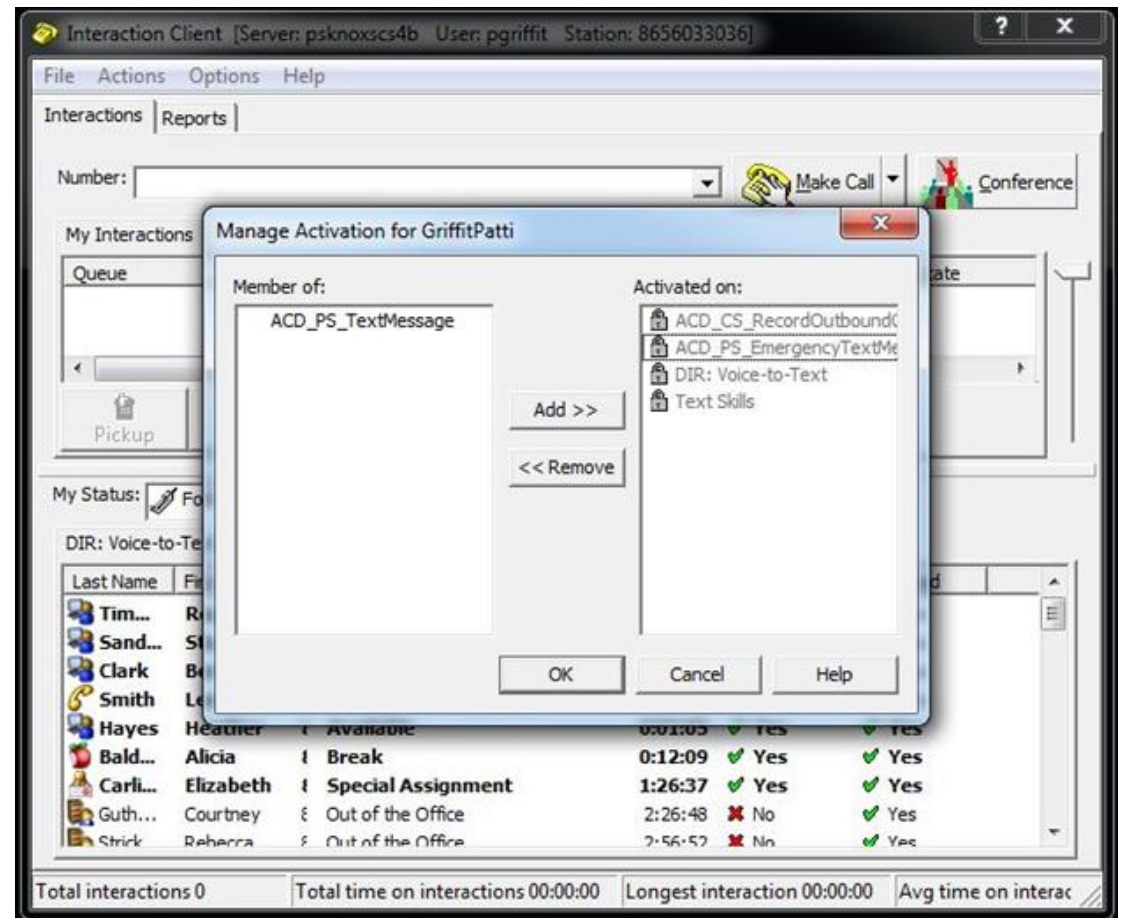
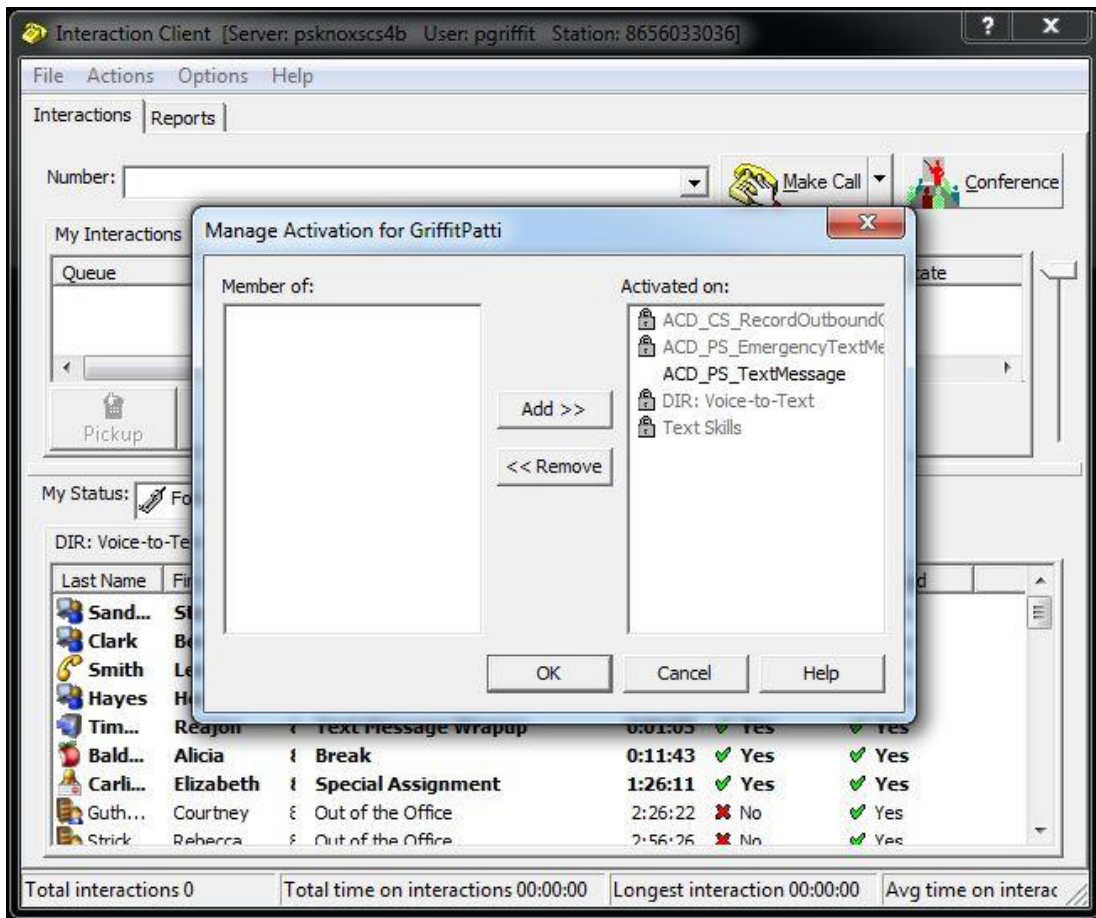
My Status: [Follow Contact Schedule] [Until]

DIR: Voice-to-Text | ACD_PS_TextMessage

Last Name	First Name	P	Status	Time in Status /	Logged In	Activated
Hayes	Heather	1	Taking Text Message	0:00:06	✓ Yes	✓ Yes
Smith	Lesley	1	Taking Text Message	0:00:16	✓ Yes	✓ Yes
Tim...	Reajon	1	Taking Text Message	0:00:34	✓ Yes	✓ Yes
Sand...	Stacy	1	Available	0:00:56	✓ Yes	✓ Yes
Clark	Bergan	1	Taking Text Message	0:01:19	✓ Yes	✓ Yes
Bald...	Alicia	1	Break	0:10:26	✓ Yes	✓ Yes
Carli...	Elizabeth	1	Special Assignment	1:24:54	✓ Yes	✓ Yes
Guth...	Courtney	ε	Out of the Office	2:25:05	✗ No	✓ Yes
Strick	Rebecca	ε	Out of the Office	2:55:09	✗ No	✓ Yes

Total interactions 0 | Total time on interactions 00:00:00 | Longest interaction 00:00:00 | Avg time on interac

- Remove yourself from the V2T Work Group using Interaction Client.
- Select Options menu from the Interaction Client window.



1. Click "OK" to complete the process.
2. At this point you are out of the work group and can safely send the message without getting another incoming call.
4. Click "Send" to send the message.
5. Transition to appropriate phone state in the V2T application.
6. Repeat the process to return yourself to the V2T Work Group.

REMEMBER: You should never be out of the work group for more than 30 seconds at a time!

Quality Assurance

The goal of a quality monitoring system is to ensure that we are providing our clients the best possible service at all times. Measuring alone is only a small part of this process, when combined with targeted feedback and training, the process works to help agents improve their skills.

The 4 main steps in a quality assurance process:

1. A random sampling of calls from each agent is reviewed and scored to provide an accurate picture of how the agent is performing at that moment in time.
2. The call monitoring forms are completed including detailed notes of areas in which the agent performed well and/or poorly.
3. Management then reviews the call performance with each agent and provides coaching in areas where the agent is struggling.
4. The agent applies these lessons to improve his or her performance on future calls.

The cycle then repeats itself over and over each month. A Quality program is more of a journey than a destination.

Agent Name: _____

Date: _____

100

	YES	NO	N/A	C
Greeting 2.0%				
Did the agent use the appropriate greeting?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1
Message 30.0%				
Did the agent accurately capture the caller's name?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5
Did the agent verify the patient's name and spelling?	First Name	<input type="checkbox"/>	<input type="checkbox"/>	10
	Last Name	<input type="checkbox"/>	<input type="checkbox"/>	10
Was the Doctors name confirmed and spelled correctly?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10
Were medical terms spelled correctly?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5
Did the agent avoid critical typos?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6
Process 20.0%				
Was callback number confirmed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7
On patient calls, did agent request removal of call block and or explain.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5
Closing 2.00%				
Did agent use an appropriate closing?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1
Agent Performance 16.0%				
Did agent express appropriate level of empathy / establish rapport in a Professional Manner?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4
Did agent handle question of callback expection appropriately?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3
Did agent handle request of office information correctly?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3
Critical Call Elements				
Agent hung up on caller.	<input type="checkbox"/>			
Agent provided medical advice.	<input type="checkbox"/>			
Agent did not accurately capture the caller's message.	<input type="checkbox"/>			
Agent did not ask for information for all fields on text form.	<input type="checkbox"/>			
PHI was included in the message field.	<input type="checkbox"/>			
Metrics 30.0%				
Agent Total Time to Answer < 3 seconds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10
Agent Total Time on Call < 70 seconds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10
Agent After Call Wrap < 5 seconds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10
100.0%				100

Supervisor

Date

Representative

Date