

**Report ID:** 10003  
**Location:** Anytown Cardiology Department; 123-456-7890  
**Date & Time:** 11/12/2010 12:10:00 PM  
**Objective:** My mother has congestive heart failure and I want an appointment for her with a Cardiologist.  
**Overall Experience:** Mostly Unsatisfactory

---

## Narrative Report

I placed the call to XYZ Hospital's Anytown location on November 12, 2010 at 12:07 p.m. The line rang once and went straight to an audio recording thanking me for calling XYZ Hospital's Anytown location. The recording stated that the call may be recorded for quality purposes, then offered me an alternative phone number for injury-related appointments.

After holding for two minutes, the line rang once and was answered, "Thank you for calling XYZ Hospital's Anytown location. This is John. How can I help you?"

John spoke a bit fast, and I could not understand what he said. I asked him to repeat himself and he slowly and clearly repeated his greeting. I told John that I needed to make an appointment with a Cardiologist for my mother. He told me that he could transfer me to Cardiology scheduling, and I said that would be fine.

John then transferred the call and it rang once before going to the same recording. After holding for only fifteen seconds or so, the line was answered, "Thank you for calling XYZ Hospital's Anytown location. This is Jane. How may I help you?"

I said hello and told Jane that I needed an appointment with a Cardiologist for my mother, who had congestive heart failure.

"Has your mother seen one of our Cardiologists before?" Jane asked. I told her no. She then asked if my mother was a patient of XYZ Hospital, and I again told her no. I explained that my mother had a primary physician, but not within XYZ Hospital's health system. Jane asked which type of insurance my mother had, I told her Aetna. When she asked whether it was an HMO or a PPO, I told her I thought it might be a PPO.

Jane said that she needed to know the type of insurance so she'd be able to tell me if my mother needed a referral. She explained that if it was a PPO, my mother could do a self-referral. However, if her insurance was an HMO, and she would need a referral from her primary care doctor. Jane explained that it could take time to process a referral before she could register my mother for an appointment.

I asked Jane how long it would take to get an appointment once my mother obtained a referral, if needed. Jane was initially ambiguous with how long this would take. She even said, "If she's

self-referring, it could be some time in December.”

I asked again if she knew the schedule. I explained that I could get the insurance information from my mother, but I wanted to know what kind of time frame I had to work with. Jane asked for my mother’s first and last name, which I gave as Brianna Young. Then she asked for her date of birth, which I gave as August 17, 1952.

Jane checked her computer, and I could hear her muttering to herself about the schedule. After a few seconds, she finally said, “I don’t know. I’d have to register her.” Then there was another silence, and I assumed she was looking at the individual doctors’ schedules. She continued to mutter as she checked her computer for the next minute.

Eventually, Jane told me that some of the doctors had appointments as early as next week. I asked if my mother could only get one of those if she had a referral. “It depends,” Jane said, but she wouldn’t give me any more details without a referral and going through the registration process.

I asked her which days next week were available, and specifically asked about the following Tuesday. Jane told me that there were some appointments on Tuesday, but she didn’t know if they’d be available once I got the referral and the registration processed.

I told her that I would talk with my mother and get her information. Jane told me that when I called to get her registered, I would need her insurance card so she could verify it.

I told her I would do that. She closed by saying, “Thank you for choosing XYZ Hospital. Have a great day.”

Overall, I rated this experience as Mostly Unsatisfactory.

My interaction with John was limited, all I could suggest is that he slow down his speech a little when answering the phone.

I found Jane to be initially helpful but eventually difficult, especially when I was asking for a specific time for the available appointments. She wouldn’t give any more details except for “a couple of appointments next week,” even though she initially said that my mother probably wouldn’t be able to get in until December. Also, when she was checking the schedule, she was muttering to herself and sounded annoyed with me (with phrases like “Oh my lord” and talking back to the computer) presumably because I didn’t have the information to make things easy. On the whole, Jane wasn’t very helpful, and I had to push to get even the most general information. I would recommend that, in the future, Jane show more interest in the caller’s situation, be friendly, and clearly explain procedures so she does not come off as brushing people off.

First Appointment times available: “One on Tuesday” and “A couple of appointments next

week.”

## Quantitative

<b>XYZ Hospital Healthcare Telephone Standards</b>			
	<b>Contacts</b>	John	Jane
Telephone was answered within three rings.		YES	YES
▶ Employee identified himself or herself.		YES	YES
▶ Employee identified the department or practice name.		YES	YES
Employee verbally offered assistance such as, "How may I help you?"		5	5
Employee spoke slowly and clearly.		3	4
Employee used a friendly tone of voice.		5	4
▶ Employee used the caller's name.		NO	NO
Employee showed respect for the caller by listening empathetically.		5	3
Employee apologized for any inconveniences.		N/A	NO
▶ Information was provided to the customer's satisfaction.		5	3
Employee was an active listener (i.e., employee repeated back information provided by patient to confirm correctness – phone number, spelling of name, etc.)		5	3
▶ Did the appointment scheduler ask the caller, "When would you like to come in?"		N/A	NO
Appointment scheduler offered an alternative appointment(s)		N/A	2
Appointment scheduler offered an alternative doctor(s)		N/A	N/A
Caller was provided with the extension number they were being transferred to		NO	N/A
▶ Employee asked permission to put the customer on hold and waited for a response.		5	N/A
After returning from being on hold, the employee thanked the caller for holding.		N/A	N/A
The voice mail message was professional.		N/A	N/A
Directional assistance was provided, as needed.		N/A	N/A
Employee offered - "Is there anything else I can do for you?"		N/A	YES
Employee effectively and pleasantly ended the call.		5	4
Employee concluded the call with, "Thank you for choosing XYZ Hospital."		YES	YES
▶ Employee demonstrated a positive attitude.		5	3

Scale

5=Completely Satisfactory

4=Mostly Satisfactory

3=Mediocre

2=Mostly Unsatisfactory

1=Completely Unsatisfactory