

Call Audit Template

For Evaluating Staff Call Performance and Protocol Compliance

Question	Answer (Yes/No)	Notes / Comments
Did the staff member use proper phone etiquette throughout the call?		
Did the staff member correctly identify the patient?		
Did the caller identify any concerns requiring further attention?		
If so, were those concerns properly handled by the staff member?		
Did the staff member validate the caller's concerns and reason for the call?		
Were clinic protocols followed appropriately by the staff member?		
Did the staff member schedule the caller according to guidelines?		
Did the staff member correctly escalate the call if applicable?		
Did the staff member document the call appropriately?		