First-Call Resolution Workflow

Use this five-step flow for every inbound call:

01 Clarify the Concern

- Ask open-ended questions to understand the full issue
- Restate the concern to confirm accuracy, for example: "So you are calling to reschedule your follow-up and check on a referral, is that correct?"
- Ask targeted follow-up questions based on the caller's needs, such as appointment scheduling, records, or insurance

02 Check for Resolution Authority

- Determine if the issue is within your scope of responsibility (for example, scheduling, refills, insurance verification)
- Confirm if you have access to the necessary tools, such as the electronic medical record and current insurance information
- Decide if you can fully resolve the issue or meaningfully move it forward during this call

03 Act Immediately or Escalate Intentionally

- If you can resolve the issue, do so immediately
- If escalation is necessary:
  - Explain why escalation is needed, for example, "Our nurse needs to review your chart first."
  - Provide a realistic timeframe and document who will follow up

04 Confirm and Recap

- Summarize the next steps clearly, such as: "You are scheduled for next Tuesday at 10 a.m., and I have flagged your prescription question for our nurse."
- Ask if there is anything else the caller needs, for example: "Did we cover everything for today?"

05 Document in Real Time

- Record call date and time, issue, resolution, and any escalations
- Use structured notes whenever possible, following the format:
  - Patient Request > Action Taken > Next Steps or Follow-Up

Phrases to Support Resolution

- *"Let's take care of that while I have you on the phone."*
- *"I can do that right now. Please hold for a moment while I pull up your information."*
- *"Here is what we can do today and what will happen next."*

First-Call Resolution Checklist

Reducing Callbacks and Increasing Patient Confidence

STEP	COMPLETED / NOTES
Asked open-ended questions	
Restated concern to the patient	
Verified patient identifying details	
Attempted resolution during call	
Escalated only when necessary	
Explained next steps or follow-up	
Asked if anything else is needed	
Documented call details in system	