



PHYSICIAN STRATEGY GROUP

SERVING THE USPI PHYSICIAN NETWORK

PATIENT SERVICE SPECIALIST COMMUNICATION SKILLS – COACHING OBSERVATION

Date: _____ Coach/Observer: _____ Provider: _____

PROFICIENT <input checked="" type="checkbox"/>	OPENING AND INTRODUCTION	IMPROVEMENT OPPORTUNITY <input checked="" type="checkbox"/>
Acknowledge		
	Greeted patient by name upon entering office or reception area	
	Smile appropriately	
Introduce		
	Introduced self and role	
	Welcomed patient to the practice/Welcomed the patient back	
	Managed up physician or practice with positive comments to patient	
Duration and Explanation		
	Confirmed physician and appointment time	
	Used easy to understand examples, avoiding medical jargon and abbreviations	
	Gave specific information about wait time to see the doctor	
	Apologized for known delays	
	Provided patient with options – wait, run errands, reschedule if delay is lengthy	
	Explained purpose of collecting insurance information	
	Reviewed and explained plan specifics if co-pay or payment is required	
	Asked patient if they have additional questions about their appointment or coverage	
Thank You		
	Thanked patient for their information and for arriving on time	
	Asked if there is anything else they could do for patient	
	Provided business card to new patients	
HELPFULNESS, COURTESY AND RESPECT		
	Answered phone with appropriate greeting and smile in voice	
	Offered options when scheduling appointments – preferred day of week, time, etc.	
	Gave clear explanations for scheduling restrictions and provide alternatives	
	Demonstrated flexibility and problem solving when scheduling conflicts occur	
	Asked if patient had additional questions about their appointment	
	Communicated delays as they occur and kept patient updated on waiting time	
	Apologized without blame for delays	
	Spoke in confidential tones when discussing medical or insurance issues with patient	
	Maintained confidentiality of all patients in reception and check-in area	
CLOSING THE VISIT		
	Asked patient <i>“How was your visit today? Is there anything we could improve or do better?”</i>	
	Thanked the patient for choosing the practice	
	Reminded patient about receiving and completing a survey	



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NON-VERBAL COMMUNICATION CUES		
	Maintained good eye contact	
	Smiled and presented a positive demeanor	
	Used a welcome and friendly tone of voice	
	Listened without interrupting	
	Did not multitask and avoided distractions (phone, computer, tablet)	
	Used positive posture, sat upright, leaned forward	
	Facial and hand gestures did not come across as hurried or exasperated	
	Kept reception space tidy, picked up trash, magazines, etc.	
	Rounded in reception area regularly checking on patients' comfort, update on appointment times	
	Refreshed water and coffee area (if applicable)	
	Demonstrated respect for cultural norms, for example touching or personal space	
	Maintained dignity of patient who are compromised or appear different	
COACH FEEDBACK AND RECOMMENDATIONS		
<input type="checkbox"/> EXPERT COMMUNICATOR <input type="checkbox"/> PROFICIENT COMMUNICATOR		<input type="checkbox"/> REPEAT OBSERVATION