

**FRONT DESK PROTOCOL**

**The Complete Medical Weight Loss Business System**

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**DISCLAIMER:**

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# S:\1-Internal\Jordan's Desktop\Documents\Jordan's Things\HHMC 3d logo.pngFront Desk Protocol

## Part 1 – Phone Script and Consultation Visit

**Purpose:** Welcome new and existing patients and encourage new callers to schedule a free consultation.

**New Consultation Phone Script:**

A prospective weight loss patient will call the office to set up a free consultation. Their initial phone call consists of something similar to the following conversation:

**Employee:** “Thank you for calling **(YOUR CLINIC NAME)**! My name is \_\_\_\_. How may I help you?”

**Patient:** “What can you tell me about your weight loss program?”

**Employee:** “I’d be happy to go over that with you, but may I first ask your name and how you heard about us?”

**Employee:** “Great thank you **(PATIENTS NAME)**! Our clinic offers many *weight loss options such as appetite control, HCG, lipotropic injections, and nutritional coaching (mention any promotions you may have)*. We set up a customized package for each and every patient in order to help you achieve all of your weight loss goals. **(PATIENTS NAME)** would mornings or afternoons work for your free consultation?”

**Patient:** “Well, first I’d like to hear how much these packages cost.”

**Employee:** “I understand, however **(PATIENTS NAME)** since each package is customized to fit every patient’s individual needs, our package prices vary quite a bit and we also need to know if you medically qualify. Does Monday at 2:00 p.m. work for you?” [**Notice how you are to take control of the conversation and direct it back to the appointment.** **Also, notice we have said the patient’s name 3 times. This builds rapport with the potential patient before they ever walk in the door setting them at ease. Statistically, a patient is less likely to ‘no show’ if they are booked within 48 hours from initial contact.**]

**Patient:** “Yes, that time would work just fine.”

The employee will then schedule 60 minutes for the consultation and 30 minutes with the Medical Provider. Ask them to arrive five (5) to ten (10) minutes prior to their consultation in order to complete the paperwork in the office. This initial phone call is ended by giving the patient directions to your office and letting them know you look forward to meeting them!

**Consultation Visit:**

When a new patient arrives for their free consultation, they are welcomed immediately by the front desk employee and asked to complete the **Sign-In Sheet.** The patient is given a clipboard with the **New Patient Questionnaire** to complete. *Do not* give the patient medical intake forms. In addition, the patient is offered something to drink.

Once the questionnaire is completed, the patient is encouraged to flip through a testimonial binder while their paperwork is delivered to the consultant who is responsible for conducting the consultation. Once the consultant has reviewed the questionnaire, the patient is called into the consultation room by the consultant.

## S:\1-Internal\Jordan's Desktop\Documents\Jordan's Things\HHMC 3d logo.pngPart 2 – Understanding the Superbill

This portion of the Superbill identifies the patient, date of service and type of visit.

|  |  |
| --- | --- |
| **PATIENT NAME:** | **DOS/APPT:** |

**New Patient Current Patient RTA HCG Eval HCG: Initial or Refill**

 **45 Day 23 Day**

**HCG Pickup Counseling Med refill Vitamin Injection Lab Work**

 **Diet Panel Other**

**Patient Name:** Medical staff notates the patient name in this area.

**DOS:** Medical staff notates the date of service/the day the patient came into the office.

**New Patient**: If this is circled, it indicates this is the patient’s initial visit.

**Current Patient:** A patient who comes in regularly.

**RTA:** This is a patient who has been inactive for a six (6) months or more and is “Returning to Active” status.

**HCG Eval:** The patient is here strictly for an evaluation to be cleared for taking HCG; this is circled for either an initial exam, or an exam for an HCG refill.

**HCG: Initial or Refill:** Indicates whether this is the patient’s first time doing HCG or if they are here for an evaluation for a refill.

**45 Day or 23 Day:** Indicates the approved length of time of the HCG prescription for the patient.

**HCG Pickup:** This is circled if the patient is picking up their HCG.

**Counseling:** Indicates the patient is in for weight loss counseling.

**Med Refill:** Indicates the patient has a medication follow-up appointment.

**Vitamin Injection:** Indicates the patient is in for a vitamin injection.

**Lab Work:** Patient visit is for a blood draw.

**Diet Panel:** Indicates the patient is having a diet panel drawn (CBC w/diff, Chem 14 and fasting lipid panel); this is the panel performed for all weight loss patients.

**Other Panel:** Indicates something other than the usual diet panel. Medical staff will notate the specific panel(s) performed.

### S:\1-Internal\Jordan's Desktop\Documents\Jordan's Things\HHMC 3d logo.pngUnderstanding the Superbill (Cont.)

This portion of the Superbill clarifies the dispensed medication and charges.

|  |  |
| --- | --- |
| Office Visit: | **$75.00** |
| Diet Panel: | **$70.00** |
| **Medications:** |  |
| Place medication sticker here | $ \_\_\_\_\_\_\_\_\_\_\_\_ |
| Place medication sticker here | $ \_\_\_\_\_\_\_\_\_\_\_\_ |
| Place medication sticker here | $ \_\_\_\_\_\_\_\_\_\_\_\_ |
| 🞏 HCTZ x \_\_\_\_\_\_\_\_ 🞏 K+ x \_\_\_\_\_\_\_\_ | $ \_\_\_\_\_\_\_\_\_\_\_\_ |

**Office Visit:** This indicates the patient saw the Medical Provider. (This is not circled if the patient comes in for coaching, vitamin injections or blood draws.)

**Lab Work:** Indicates the patient had blood drawn.

**Medications:** This identifies which medication(s) were dispensed to the patient; this portion is used to record the normal daily dose prescribed along with any ‘boosters.’

(For example: for a two-week supply of Phentermine, the Medical Provider would provide the medication sticker from the dispensing software indicating Phentermine 37.5mg and quantity 14.)

Anything extra is considered a booster and is notated on the medication sticker (for example: the patient has a higher tolerance for the medication and takes more than the customary dose). The front desk can record the fee associated with the quantity of medication dispensed. *Boosters are never prepaid and must be collected at the time of the visit regardless of package.*

**Booster Medication:** This shows that the patient received additional medication. (For example: some patients take two (2) 37.5mg phentermine per day instead of one (1).

**HCTZ 25mg/K+:** Indicates that HCTZ and K+ (water and potassium) pills are dispensed. The quantity is notated in the blank space following the “x.”

**AppTrim:** Indicates that provider dispensed only supplemental pills are dispensed. The quantity is notated in the blank space following the name of the supplement. Please make sure the price is correct. AppTrim does have a price difference.

This portion of the Superbill indicates the quantity and type of injections purchased, administered to or taken home by a patient. Medical assistant circles the correct type of injection and notates the quantity of injections purchased/administered/taken home in the corresponding spaces. Occasionally, patients will purchase injections, have one administered, and take the rest home.

|  |  |
| --- | --- |
| **Injections:** |  |
| **B12** | **Lipo Plus** | **Super B** | $ \_\_\_\_\_\_\_\_\_\_\_\_ |
| Administered: \_\_\_\_\_ + Taken Home: \_\_\_\_\_ | Total: \_\_\_\_\_ ($\_\_\_\_ each) |

**Packages, SuPplements, Products, Notes, Misc:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Quantity:** | **Description (Product/Package):** | **Staff Initials:** | **Price:** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| Return In: \_\_\_\_\_ Days \_\_\_\_\_ Weeks \_\_\_\_\_ Months🞏 Cash 🞏 Check 🞏 Credit/Debit Card 🞏 Care Credit  | **Subtotal:** | $ \_\_\_\_\_\_\_\_\_\_\_\_ |
| **Tax:** | $ \_\_\_\_\_\_\_\_\_\_\_\_ |
| **Total Due:** | $ \_\_\_\_\_\_\_\_\_\_\_\_ |
| **Paid (Staff Int.):** | $ \_\_\_\_\_\_\_\_\_\_\_\_ |

**Packages, Supplements, Products, Notes, Misc.:** This is where staff can handwrite other items that the patient purchases (such as monthly specials, products, packages, etc.) or important notes (for example: “Patient MUST have blood draw before next visit” if the Medical Provider wants the patient’s blood drawn before seeing the patient again). If patient is purchasing products, the quantity and prices of the products should be notated under the appropriate columns. If the patient is purchasing a package, the specifics of the package should be hand-written in the center column.

**Return in:** Medical Provider indicates when the front desk should schedule the patient’s next visit.

**Cash/Credit/Check:** Indicates how the patient paid for the visit’s charges.

**Subtotal:** Indicates the patient’s total cost, before taxes.

**Tax:** the amount of sales tax due with patient’s purchase (products are taxed, services, medications and injections are not).

**Total Due:** Total to be collected from the patient for the day’s visit after you add the subtotal and tax together.

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### S:\1-Internal\Jordan's Desktop\Documents\Jordan's Things\HHMC 3d logo.pngSample Superbills

#### Prepaid with hctz/k+ and Injection

|  |  |
| --- | --- |
| **PATIENT NAME:** | **DOS/APPT:** |

**New Patient Current Patient RTA HCG Eval HCG: Initial or Refill**

 **45 Day 23 Day**

**HCG Pickup Counseling Vitamin Injection Lab Work**

 **Diet Panel Other**

|  |  |
| --- | --- |
| Office Visit: | **$75.00** |
| Diet Panel: | **$70.00** |
| **Medications:** |  |
| Place medication sticker herePhentermine 37.5mg Qty: 30 | $ \_\_\_\_PKG\_\_\_\_\_ |
| Place medication sticker here | $ \_\_\_\_\_\_\_\_\_\_\_\_ |
| Place medication sticker here | $ \_\_\_\_\_\_\_\_\_\_\_\_ |
| 🞏 HCTZ x \_\_\_8\_\_\_\_\_ 🞏 K+ x \_\_\_8\_\_\_\_\_ | $ \_\_\_\_PKG\_\_\_\_\_ |
| **Injections:** |  |
| **B12** | **Lipo Plus** | **Super B** | $ \_\_\_\_PKG\_\_\_\_\_ |
| Administered: \_\_1\_\_\_ + Taken Home: \_\_4\_\_\_ | Total: \_\_5\_\_\_ ($\_\_0\_\_ each) |

**Packages, SupPlements, Products, Notes, Misc:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Quantity:** | **Description (Product/Package):** | **Staff Initials:** | **Price:** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
| Return In: \_\_\_\_\_ Days \_\_\_\_\_ Weeks \_\_\_\_\_ Months🞏 Cash 🞏 Check 🞏 Credit/Debit Card 🞏 Care Credit  | **Subtotal:** | $ \_\_\_\_\_0\_\_\_\_\_\_\_ |
| **Tax:** | $ \_\_\_\_\_\_\_\_\_\_\_\_ |
| **Total Due:** | $ \_\_\_PKG\_\_\_\_\_\_\_ |
| **Paid (Staff Int.):** | $ \_\_\_\_\_\_\_\_\_\_\_\_ |



## Part 3 - Statistics Report\_

The Front Desk employee is also responsible to fill in the Statistics Report information:

* Date
* Callers Name
* Callers Contact Information
* How did they hear about the clinic? (Newspaper, Radio, Facebook, Flyer, Instagram)
* Campaign (If they refer to a specific promotion or special being offered)
* Date of their appointment (it is vital to schedule a new patient within 48 hours)
* Who they will be seeing for this appointment time.
* If your office is offering virtual consultations, you will want to add a field for In Office or Virtual appointment



The Front Desk employee and the Consultant will complete this report and submit the previous month information to their trainer by the 5th day of each month.



## Part 4 – Follow-Up Calls

The Front Desk employee will do follow-up calls every morning for the patients that did not show up the previous day. This is an opportunity to reschedule for any available time that day. (Please respect patient privacy by not leaving specific appointment details on a voicemail.)

A sample follow up call:

Front Desk: “Hi, may I speak to Amanda please?”

Caller: “This is she.”

Front Desk: “Hi Amanda, this is *YOUR NAME* calling from *CLINIC NAME*, we missed you yesterday. Would today at 1:00 or 2:30 work better for you?”

Notate the Statistics Report of any ‘No Shows’ and their rescheduled appointment time. If a patient declines to reschedule, offer a virtual Consultation for their convenience and get an email to send the Zoom information. Schedule the Zoom meeting and send the invite to the patient as soon as possible and put the information on the Consultants calendar.

## S:\1-Internal\Jordan's Desktop\Documents\Jordan's Things\HHMC 3d logo.pngPart 5 - Reactivation Calls

The Front Desk staff member may be asked to do “Reactivation Calls”. This is a great way to contact previous patients to check their ongoing success and offer any specials.

Incorporate a Reactivation Program for previous patients who have completed weight loss programs and have gained some weight back.

The staff member assigned to the reactivation phone calls will pull the charts for patients who have completed a program at least 3 months or more ago.

With the chart in hand, the phone call to the past patient would be:

**Employee:** "Hi Jane, this is Debbie from Dr. Jones's office. Dr. Jones has asked me to call you and see how you are doing. I see that you lost 35 pounds with us last March. Are you still at your ideal weight of 120 pounds?"

**If yes**, the staff member will say something like "Wow - good for you - that's exactly what Dr. Jones was hoping to hear - she will be so excited when I tell her the news. Jane, can I ask you a favor? We are accepting new patients at this time and could you keep us in mind when people ask you about how you lost the weight? Is there anyone you can think of now that might want to get the same results that you got?” This is also a great time to ask the patient for a testimonial to share their success story as marketing. “Jane, we are always so proud when a patient is successful, would you be willing to share your story?”

**If no**, the staff member will say "I'm sorry to hear that but know that its ok ­ know that you are not alone, life happens to all of us- how much did you gain back? Let's get you in here and get that weight off! We actually have programs that are designed to get that weight back off of you. These programs are working great for our other patients - let's get this done - we can see you on Monday - is morning or afternoon better for you? Great - we will see you Monday at 2:00." If the patient declines to come back, depending on their reason, a virtual follow up appointment or a membership may be offered.

*Now, when these patients come back into the office,* we will discuss what worked and didn’t work to help establish the best plan of care. This is a great opportunity to promote a monthly special (if applicable). The Consultant will offer the best package for the patient to get to their goal or possibly sign them up for a Membership/Maintenance.

When the patient comes in for their consultation, **the Consultant explains: “**Dr. Jones is encouraging you do this program, to get the weight back off and keep it off this time. Dr. Jones is also recommending a 6 month membership/maintenance to ensure you have all the tools and support to maintain your success.”

## S:\1-Internal\Jordan's Desktop\Documents\Jordan's Things\HHMC 3d logo.pngPart 6 - Promote Monthly Specials and Add-Ons

The Front Desk staff member will email the monthly specials to their Constant Contact list. This will go to every person in your contact list to keep regular reminders of services you offer. The patient will determine if this is an offer they want to take advantage of.

If your clinic offers additional products, supplements, the Front Desk will ask all patients if there is anything they would like to add-on when they are checking out.

The Front Desk staff member will want to be well informed of all programs offered in the clinic so they can answer questions to patients in office and ensure their appropriate follow up appointments and allot the correct scheduling time.