



Five-Star Service Is C.L.E.A.R.

Office Staff Training



Learning Objectives

By the end of the session, the participant will be able to:

- Define the five elements of C.L.E.A.R.
- Demonstrate the five fundamentals of C.L.E.A.R. communication
- Incorporate C.L.E.A.R. communication into daily practice



Customer Service

- Why is customer service so important?
 - Meeting patients' service expectations is part of everyone's job.
- How do patients judge a medical practice?
 - When patients talk about us, we want them to use words like “courteous,” “friendly,” “caring,” “concerned” and helpful!

That's where you come in.

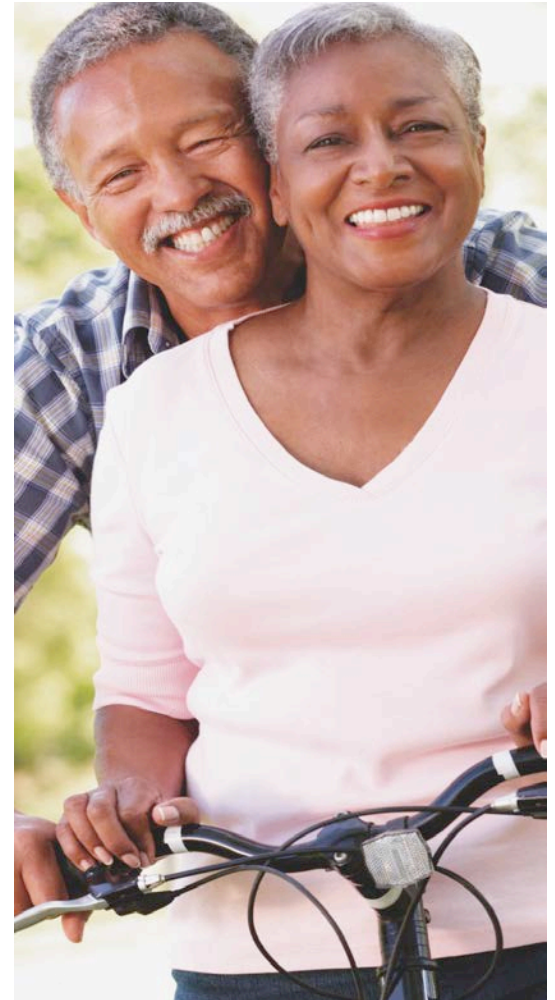




Video:

Five-Star Service Is C.L.E.A.R.

Presenter: Barbara Khozam



C.L.E.A.R. Model for Staff Members – What to DO or SAY

C

Connect

- Acknowledge patients immediately; introduce yourself
- ▶ “Good morning, Mrs. White, I’m Marie, I’m a registered phlebotomist. I’ll be drawing your blood this afternoon.”

L

Listen

- Maintain eye contact
- ▶ *No words here...just a pleasant expression!*

E

Explain

- Describe what’s going to happen; explain as you go
- ▶ “Thank you for your patience, Mrs. Saldana. The Radiology tech will be here in a few minutes.” “I’ll be attaching these leads to your chest and legs...they may feel a little cold for a second.”

A

Ask

- Check for understanding
- ▶ “Did you get all your questions answered?”

R

Re-connect

- Check back frequently with waiting patients
- ▶ “Dr. Smith asked me to let you know we haven’t forgotten you. He’ll be in as soon as he can.”

- Establish eye contact; smile
- ▶ *No words here – you know how to smile!*

- Use active listening techniques
- ▶ “Uh-huh.” “I see...”

- Use layperson’s language (not abbreviations or acronyms)
- ▶ “Do you have your Explanation of Benefits?” (Don’t say EOB.) “Here’s some information on how we respect your privacy...”

- Be sure the patient’s needs have been met
- ▶ “...is there anything else I can help you with?” “Is there something I can do to make you more comfortable?”

- Help patients find the next location
- ▶ “Mr. Johnson, let me walk you to the pharmacy.”

- Wear your name badge correctly
- ▶ *No words here*

- Use active listening body language (smiling, head nodding)
- ▶ *No words here*

- Let patients know when delays are expected
- ▶ “Dr. Jones has one other patient ahead of you. She’ll be in as soon as she can. Is there anything I can do for you while you wait?”

- Offer options, where appropriate
- ▶ “If this is not convenient would you like to change your appointment or see the Nurse Practitioner?”

- End with a friendly parting comment
- ▶ “Take care.” “Thank you for understanding. We appreciate your...(fill in the blank).”

- Use the patient’s name
- ▶ “Hi Mrs. White, how’s my favorite patient today?” “Mrs. Saldana, please wait one second while I locate your record...”

- Repeat information for accuracy
- ▶ “Let’s see if I’ve got that right...” “So you’ve been having symptoms for two weeks, is that right?”

- If there are tests or questionnaires involved before the patient sees the PCP explain what they are, how long they will take and what is needed from the patient.

- Check for understanding by using teach-back method
- ▶ “Can you please explain that back to me, just to be sure I gave you the correct information?”

- Use a friendly, helpful voice/tone; say “please” and “thank you”
- ▶ “Could you sit on the exam table, please?” “I’m glad I could help.” “Mrs. Smith, thank you for holding, how may I help you?”

- Respond with empathy statements
- ▶ “Oh, I’m sorry to hear that.” “That must be uncomfortable for you.”

C.L.E.A.R. Model for Staff Members – *What to DO or SAY*

| C | L | E |
|--|---|---|
| Connect | Listen | Explain |
| <ul style="list-style-type: none"> • Acknowledge patients immediately; introduce yourself ▶ “Good morning, Mrs. White, I’m Marie, I’m a registered phlebotomist. I’ll be drawing your blood this afternoon.” | <ul style="list-style-type: none"> • Maintain eye contact ▶ <i>No words here...just a pleasant expression!</i> | <ul style="list-style-type: none"> • Describe what’s going to happen; explain as you go ▶ “Thank you for your patience, Mrs. Saldana. The Radiology tech will be here in a few minutes.” “I’ll be attaching these leads to your chest and legs...they may feel a little cold for a second.” |
| <ul style="list-style-type: none"> • Establish eye contact; smile ▶ <i>No words here – you know how to smile!</i> | <ul style="list-style-type: none"> • Use active listening techniques ▶ “Uh-huh.” “I see...” | <ul style="list-style-type: none"> • Use layperson’s language (not abbreviations or acronyms) ▶ “Do you have your Explanation of Benefits?” (Don’t say EOB.) “Here’s some information on how we respect your privacy...” |
| <ul style="list-style-type: none"> • Wear your name badge correctly ▶ <i>No words here</i> | <ul style="list-style-type: none"> • Use active listening body language (smiling, head nodding) ▶ <i>No words here</i> | <ul style="list-style-type: none"> • Let patients know when delays are expected ▶ “Dr. Jones has one other patient ahead of you. She’ll be in as soon as she can. Is there anything I can do for you while you wait?” |
| <ul style="list-style-type: none"> • Use the patient’s name ▶ “Hi Mrs. White, how’s my favorite patient today?” “Mrs. Saldana, please wait one second while I locate your record...” | <ul style="list-style-type: none"> • Repeat information for accuracy ▶ “Let’s see if I’ve got that right...” “So you’ve been having symptoms for two weeks, is that right?” | <ul style="list-style-type: none"> • If there are tests or questionnaires involved before the patient sees the PCP explain what they are, how long they will take and what is needed from the patient. |
| <ul style="list-style-type: none"> • Use a friendly, helpful voice/tone; say “please” and “thank you” ▶ “Could you sit on the exam table, please?” “I’m glad I could help.” “Mrs. Smith, thank you for holding, how may I help you?” | <ul style="list-style-type: none"> • Respond with empathy statements ▶ “Oh, I’m sorry to hear that.” “That must be uncomfortable for you.” | |

| A | R |
|---|--|
| Ask | Re-connect |
| <ul style="list-style-type: none"> • Check for understanding <ul style="list-style-type: none"> ▶ “Did you get all your questions answered?” | <ul style="list-style-type: none"> • Check back frequently with waiting patients <ul style="list-style-type: none"> ▶ “Dr. Smith asked me to let you know we haven’t forgotten you. He’ll be in as soon as he can.” |
| <ul style="list-style-type: none"> • Be sure the patient’s needs have been met <ul style="list-style-type: none"> ▶ “...is there anything else I can help you with?” “Is there something I can do to make you more comfortable?” | <ul style="list-style-type: none"> • Help patients find the next location <ul style="list-style-type: none"> ▶ “Mr. Johnson, let me walk you to the pharmacy.” |
| <ul style="list-style-type: none"> • Offer options, where appropriate <ul style="list-style-type: none"> ▶ “If this is not convenient would you like to change your appointment or see the Nurse Practitioner?” | <ul style="list-style-type: none"> • End with a friendly parting comment <ul style="list-style-type: none"> ▶ “Take care.” “Thank you for understanding. We appreciate your...(fill in the blank).” |
| <ul style="list-style-type: none"> • Check for understanding by using teach-back method <ul style="list-style-type: none"> ▶ “Can you please explain that back to me, just to be sure I gave you the correct information?” | |