

Contacting Patients via Telephone		
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Purpose

To ensure that correct procedures are followed for all telephone contact with patients and that confidentiality and data protection regulations are followed. All information discussed should be summarised and documented in the patients records. Ensure your mandatory training is up to date and seek further information if needed.

Procedure

Prior to the call

Ensure that the patient is suitable to contact by telephone e.g. exclude children, patients that are deaf and those that need an interpreter, (for vulnerable patients you may need to ask for guidance from a colleague) If the patient has a carer recorded the call may be directed to their phone.

If there is a mobile and landline number recorded – try the landline first as patients may be in a public area when contacted via their mobile number.

Check that a similar call to the patient hasn't been made very recently unless it is urgent that you contact the patient.

Ensure that you are in a confidential area and that there are no patients, visitors or contractors in the room.

During the call

Open up the patient's clinical record so that information can be added as soon as possible either during or immediately after the call.

When the phone is answered ask if you are speaking to the patient e.g. 'is that Mickey Mouse'? If the patient says yes explain that it's a routine call from the GP surgery and ask them to confirm their date of birth for confidentiality reasons. If somebody else answers the call ask to speak to the named patient (Forename, Surname) and if asked say it's a routine call from the doctor's surgery.

Once confirmed, introduce yourself properly e.g. 'I'm Donald Duck, the practice pharmacist' then ask if it's a convenient time to speak to them, if not then arrange a suitable time to call back. Explain to the patient why you are calling and ask any relevant questions, check if they need to write down any details from the call. Only discuss relevant information and if in any doubt about the information you are giving or are being asked by the patient seek advice and call the patient back if necessary.

Give the patient time to ask questions and check that the patient has understood any information or advice you have given to them.

Book any appointments if appropriate e.g. medication review clinic, BP or blood test.

After the call

Document all relevant information and send any necessary tasks to other staff, book follow up calls or visits, contact community pharmacy, DAC etc. Send a prescription if needed to a clinician for authorisation or sign if you are the clinician. For printed prescriptions ensure they are printed at the correct site/printer and leave in the appropriate place for the patient to collect

Add a diary entry if appropriate for a future call/appointment.

Leaving messages if the patient is unavailable

If the call is to a landline and the voicemail is NOT personalised do not leave a message
If the call is to a landline and the voicemail is personalised e.g. "this is the voicemail of Mickey Mouse, please leave a message" then a brief generic message may be left "hello, this is a routine call from the doctors surgery, please call back on 0161 111 1111 between x am and x pm"

If the call is to a personal mobile leave the message as above.

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