PRACTICE OPERATIONS MANUAL

CUSTOMER SERVICE POLICY

powerdiary

CUSTOMER SERVICE
CLIENT EXPERIENCE

CUSTOMER SERVICE

Purpose

The purpose of this policy is to establish consistent standards and procedures for customer service.

Policy

[BusinessName] strives for excellence and professionalism in providing customer service, both inside and outside the practice, within the limits of available, well-managed resources.

Team members understand and agree upon these values:

- Employees understand that they represent the practice and must set out to make a positive first impression, whether face-to-face, verbally, in writing, or online
- Anticipating the needs of clients and planning accordingly
- Greeting clients promptly, cheerfully and respectfully
- Listening carefully and giving full consideration to client requests and concerns
- Communicating honestly, courteously and knowledgeably
- Providing follow-through for clients promptly, responsibly and efficiently
- Serving with pride, commitment, and high ethical standards
- Showing respect for each individual
- Not promising what cannot be delivered
- Giving clear reasons if it is not possible to accommodate a request
- Maintaining client privacy at all times

Procedure

In serving clients, the following standards are followed:

- Answer 80% of calls within 20 seconds
- Resolve 85% of inquiries at the first point of contact
- For clients visiting in person, 95% of inquiries will be answered within 3 minutes
- Respond to social media inquiries within 48 hours
- For social media communication, if a response cannot be provided via a social media platform, advice is provided on how to officially lodge inquiries with customer service
- When clients write, fax or email, correspondence is acknowledged within 5 business days of receipt- clients will be advised of completion in 20 business days
- Deal with complaints as a priority, where the issue is complex, it may take up to 28 business days to resolve

CUSTOMER SERVICE
ACCESS & PARKING

ACCESS & PARKING

Purpose

The purpose of this policy is to ensure access to the practice for all clients, including those who have physical disabilities or other special needs.

Policy

[BusinessName] employees acknowledge that access to the practice is important to clients. Where possible, wheelchair access, suitable parking and pictorial signage is provided to assist clients with a physical or intellectual disability.

Where physical access is limited to the practice and its facilities, or where physically attending the practice could result in an adverse outcome for the client, the practice provides off site or home visits.

Car parking facilities are available within a reasonable distance of the practice for clients and visitors. There are designated spots for disabled drivers where required by law.

Procedure

- Employees are aware of parking arrangements, and ensure that they do not park in designated client parking
- The practice provides physical access to clients, visitors and employees via the main entrance
- Doorways and walkways are kept free of clutter to ensure a clear pathway for all persons and in an emergency

Prominent signs at the front of the site / on the door

- Allow the public to easily locate the practice and parking facilities from the street
- Display the practice name, address, hours open, telephone numbers (work & after hours)

Access for clients with disabilities

- Wheelchair access is provided to reception, toilets and consulting rooms
- Designated disabled parking is provided in close proximity to the entrance

Customer Service
APPOINTMENTS

APPOINTMENTS

Purpose

The purpose of this policy is to ensure excellent customer service in the scheduling of appointments.

Policy

The practice's client scheduling system is flexible enough to accommodate clients with urgent, non-urgent, complex and planned chronic care, and preventative needs.

The individual preferences of practitioners are accommodated, and practitioners are consulted about the length and scheduling of appointments. Clients can request to see their preferred practitioner. The practice makes an effort to accommodate clients with urgent matters even when fully booked.

The length of consultation will vary according to individual client needs. Practitioners aim to provide enough time for adequate communication between clients and the practitioner to facilitate preventative care, effective record keeping and client satisfaction.

Where possible, or as required by law, information is provided in advance about the cost of care and the potential for out of pocket expenses.

Procedure

Each practitioner has specific times allocated to their consulting sessions with documented needs for interval times, short / long consultations, diagnostic tests, procedures or other requirements.

One appointment is required for each client requesting to be seen.

Clients are able to request their preferred practitioner when making an appointment, and employees will seek to ensure that clients generally see the same practitioner. If clients are unable to obtain an appointment with their practitioner of choice, they are advised of the availability of other practitioners at this time (where appropriate).

Employees are trained to have the skills and knowledge to assist clients in determining the most appropriate length and timing of consultations, and to acknowledge and act accordingly for clients with urgent matters.

Appointment type and consultation fee information is available on the practice website and on signage at reception.

Customer Service
APPOINTMENTS

APPOINTMENTS (CONTINUED)

Emergency and Priority Cases

Upon receipt of an emergency / priority request, gather the following details:

- Client Name
- Client contact number
- Reason for the appointment

If the client is in crisis, encourage them to call an emergency line or visit their nearest emergency department. If the appointment request is appropriate for the practitioner to handle, contact the practitioner, or if the client is new, the practice manager or senior practitioner to approve the priority / emergency request.

If the request can be accommodated, contact the client and book the appointment into the calendar.

If the request cannot be accommodated, ask their clinician for alternative services / options for the client, then contact the client and advise that there is no availability for an urgent appointment, but they'll be placed on a cancellation list and advised of the alternate services (where applicable). Offer them the next available appointment and process accordingly.

Customer Service
TELEPHONE

TELEPHONE

Purpose

The purpose of this policy is to facilitate optimal telephone communication with clients and others interacting with the practice.

Policy

An incoming telephone call is often the method for initial and subsequent communication by a client and other persons to the practice. As such, the telephone is acknowledged as a vital tool for creating a positive first impression, displaying a caring, confident attitude and acting as a reassuring resource for clients and others.

Procedure

Employees are mindful of confidentiality and respect clients' right to privacy. Client names are not openly stated over the telephone within earshot of other clients or visitors. [BusinessName] prides itself on customer service, especially in the areas of client security, confidentiality, and right to privacy, dignity and respect.

- Clients may be anxious, in pain or distracted by their own or a family member or friend's condition- employees act to provide a professional and empathetic service while attempting to obtain adequate information from the caller
- Employees do not argue with or interrupt callers- courtesy should be shown to all callers
- If taking a message or when assessing caller needs, do not hurry the caller, nor speak with an urgent, loud voice
- If necessary, repeat questions or messages clearly
- Employees obtain caller consent before placing them 'on hold'
- Employees are familiar with each practitioner's policy of returning or accepting calls
- Personal calls should be kept brief, mindful of engaging telephone lines
- Never attempt to diagnose or recommend treatment over the phone

A log is used to record all significant and important telephone conversations, including after hours contacts and urgent queries. The information can later be recorded in the client's file if required.

Customer Service
GREETING OF CLIENTS AND OTHERS

GREETINGS OF CLIENTS AND OTHERS

Purpose

The purpose of this policy is to ensure a positive first impression for clients, visitors and anyone who interacts with the practice in person.

Policy

Clients and other visitors are welcome to the practice. Employees value the principles of good relations whether it is in person, via written or electronic form, or on the telephone. Clients and visitors are shown friendly, courteous recognition and assistance.

Procedure

When a person presents at reception or lingers in the entrance or other areas of the practice and remains unidentified, employees ask if they may help and elicit the reason for the person's presence. Employees introduce themselves and offer assistance.

- If the person has an appointment, ensure that the client is correctly identified, note that they've arrived in Power Diary, and ask the client to wait in the waiting room- if a practitioner is running late, advise the client of the delay
- If the visitor is an unsolicited representative with no appointment pre arranged, then check the policy for each employee and follow protocol
- Visitors who will require moving throughout the practice are to sign the visitors book and enter times of arrival and departure
- A visitors badge is supplied while on the premises- all employees are advised when these visitors are in the practice

Clients generally wait less than 10 minutes after their appointed time before they are seen by the practitioner. Clients are advised of any delays when a practitioner is running late. If the wait for the appointment is more than 10 minutes, offering a drink of water or alternative should be considered. Wherever possible, scheduled clients are sent a text message or called prior to arrival to advise of a delay.

Customer Service
RESPONDING TO CLIENT REQUESTS

RESPONDING TO CLIENT REQUESTS

Purpose

The purpose of this policy is to set expectations for responding expediently, effectively and with a caring attitude to client requests.

Policy

When a client, or prospective client, takes the time to contact the practice, employees understand that the client is looking for some type of assistance. Generally, clients are seeking initial information, additional information, making or changing an appointment, or seeking the resolution of a problem.

Employees respond to clients in a timely manner.

Procedure

[BusinessName] employees can resolve the majority of requests at the first point of contact.

In cases where a call back is required, the following apply:

If the request is directed toward a practitioner or staff member, the person taking the request will review the roster and advise the client as to the next time the person will be on duty. The message taken is to include:

- Client Name
- Date of Birth
- Contact number
- Nature and explanation of the request

It is expected that the practitioner / staff member contacts the client on the same day that they return to duty.

If the client states they can not wait for the practitioner to return to duty, or the staff member triages the request as urgent, the message is directed to the senior practitioner or practitioner on duty. The caller will be advised they will receive a return call by the end of business day.

The message is taken by the staff to include:

- Client Name
- Date of Birth
- Contact number
- Nature and explanation of the request

Customer Service
CLIENT RIGHTS

CLIENT RIGHTS

Purpose

The purpose of this policy is to protect and respect the rights and needs of all clients.

Policy

No client is refused access treatment on the basis of gender, race, disability, age, religion, ethnicity, beliefs or sexual preference. Provisions are implemented to ensure clients with a disability can access services.

[BusinessName] identifies important / significant cultural groups within the practice. The practice strives to continue to develop strategies required to meet their needs. Respectful care is provided at all times, and care is mindful of clients' personal dignity.

Procedure

Right to Privacy
Visual and auditory privacy for clients is provided in the waiting room and treatment rooms.

Clients privacy and confidentiality is assured for:

- Consultations
- Health records
- Appointments
- Telephone calls
- Computer information

Employees do not leave client information in any format in areas of the practice or surrounds for unapproved access by the public. All employees sign a privacy agreement upon acceptance of employment, and risk immediate dismissal should a breach of this agreement occur. Information no longer required that contains any reference to clients, including diagnosis reports, specialist's letters, accounts etc. is shredded on site using a cross shredder or sent via a lockable bin to an off site secure facility for shredding.

Right to Refuse Treatment
Clients have the right to refuse any treatment, advice or procedure- all details are documented in the client's file. Practitioners discuss all aspects of treatment and will offer alternatives should a client seek another opinion.

If the treatment refused is of a serious nature, the client will be required to sign a waiver that details the treatment. The client will receive a copy of the waiver.

Customer Service
CLIENT RIGHTS

CLIENT RIGHTS (CONTINUED)

Right to Complain
[BusinessName] acknowledges a client's right to complain. Mechanisms are provided to ensure that this feedback, in addition to positive comments and suggestions, is freely received and implemented where possible. More information can be found in the Feedback Policy of this section.

Right to be Financially Informed
Clients are provided with sufficient information about the purpose, importance, benefits, risks and possible costs associated with proposed investigations, referrals or treatments to enable clients to make informed decisions about their health.

Practitioners may request clients sign a treatment consent statement, the statement would detail treatment type, contraindications and cost.

Right to Culturally Appropriate Care
The practice has identified the main cultural groups in the practice and strives to provide culturally appropriate written and verbal health information.

Culturally appropriate care can include:

- Request by client for a gender specific practitioner
- Role of family
- Cultural beliefs that impact on health / nutrition

Practitioners will not give treatments that are illegal in the country in which they are practicing.

Right to Clear Communication
Clients who do not speak or read the practice's country of origin language, or who are more proficient in another language, or who have special communication needs are offered the choice of using the assistance of a language service to communicate with the practitioner or employees.

[BusinessName] employees are aware of how to access and use services or technology to achieve effective communication with clients.

A contact list of translator and interpreter services and services for clients is maintained, updated regularly and readily available to all employees.

Customer Service
FEEDBACK

FEEDBACK

Purpose

The purpose of this policy is to ensure that all client feedback is considered and actioned appropriately.

Policy

Client feedback helps to measure whether services are meeting client needs and expectations. While praise is always welcome, constructive criticism is truly helpful.

Where possible, clients and others are encouraged to raise any concerns directly with the [BusinessName] employees, who are trained to make sure clients feel confident that any feedback made at the practice will be handled appropriately.

Often, feedback can be responded to and resolved at the time the client or other person makes their perspective known.

All employees are aware of their professional and legal obligations regarding the mandatory reporting of unprofessional conduct

Procedure

Clients and others have opportunities to register feedback either verbally to employees, in writing or via a suggestion box. In addition, client experience feedback is systematically collected at least every 12 months.

Depending on the nature of the feedback and if necessary, advice received from the practice's insurance company, feedback is recorded and actioned, with a copy placed in the client's record if related to care.

If a complaint can not be resolved, the practice or practitioner are able to advise the client on who they can contact to escalate the issue, this can include the practitioner's governing body or registration body.

Customer Service
FEEDBACK

FEEDBACK (CONTINUED)

Annual Survey

[Business Name] seek structured / systematic client experience feedback at least once every year. Feedback collected includes, but is not limited to, the following categories that are considered critical to clients experiences:

- Access and availability
- Information provision
- Privacy and confidentiality
- Continuity of care
- Communication skills of the practitioner and staff

The data collected is examined. Findings, including any improvements made, are communicated back to clients via the practice website, and information is made available in the waiting room.

Verbal Complaint

All employees should be prepared to address feedback as it arises.

When receiving verbal complaints, employees should consider the following, in order to reduce client anxiety and hostility that could possibly lead to litigation:

- Handle all complaints seriously, no matter how trivial they may seem
- Acknowledge the client’s right to complain
- Verbal complaints made in person should be addressed in a private area of the practice where possible
- Don’t blame others
- Be open, empathise with the way the client is feeling
- Address the client’s expectations regarding how they want the matter resolved
- Assure the client that their complaint will be investigated and the matter not overlooked
- Offer the client the opportunity to put the complaint in writing
- Document all complaints and other relevant information, and place this in the complaint folder so the employee designated to handle complaints is informed, even if you believe the matter has been resolved
- Alert the practitioner or relevant staff about a disgruntled or hostile client, so that they can assist diffuse the situation

Customer Service
FEEDBACK

FEEDBACK (CONTINUED)

Written Complaint
[BusinessName] has identified an employee to be the person responsible for feedback collection, and the analysis and handling of complaints.

When a complaint is received in writing:

- If the complaint is related to treatment refer it directly to their practitioner whenever possible. If this is not appropriate refer it to the practices line manager.
- Acknowledge the client's right to complain, and respond within 10 working days, or as quickly as possible
- Telephone the client to let them know that the practice is working on the problem
- Respond to all complaints promptly in an open and constructive manner, including an explanation and if appropriate, an apology
- Work with the client to resolve the complaint and communicate the outcome with the client, including any changes made as a result of the complaint
- Where a complaint is made against an employee, provide the employee with an opportunity to discuss the details in a private setting as soon as practical
- As a routine, contact the practice's indemnity insurer when there is a serious complaint that may give rise to a legal matter. Seek advice from the insurer on resolving the complaint before any action is taken
- Ensure the complaint does not adversely affect client care
- Record the complaint, investigation, and actions take.

Suggestion Box
The Suggestion Box is visible to visitors in the waiting room. Signage above the box should contain details of how to use the suggestion box system. The box is emptied weekly and items are followed up. Details are recorded in a Suggestions folder kept in the administration office.

Analysis
Where appropriate, complaints are reviewed at employee meetings. Examine trends and discuss the methods of resolution. All types of client feedback, including surveys, are also reviewed at employee meetings. A record of improvements made in response to client feedback or complaints is maintained as evidence of quality assurance activity. Where appropriate, inform the client about practice improvements made as a result of their input.

Customer Service

CLIENTS WITH CHALLENGING BEHAVIORS

CLIENTS WITH CHALLENGING BEHAVIORS

Purpose

The purpose of this policy is to allow for client care while protecting employees from psychological and physical harm.

Policy

This practice is by nature accessible, interactive and busy, convening some inherent risk that employees will encounter clients with challenging behaviour. Staff often have to handle the competing priorities of multiple clients at the front desk and on the telephone, as well as requirements of practitioners.

Procedure

Employees can identify situations that may escalate and attempt to avoid them. For example, if waiting times are extended, advise clients on arrival, or if aware that a particular client may be unhappy if kept waiting, keep a check on them to keep them informed.

Look for body language, including signs of escalating aggressive actions, such as frowning, staring, fidgeting, pacing, clenched fists, and gestures like pointing or chin thrusts. Learning to pick up these cues can help alert employees to act before a situation escalates.

Responses from employees can reinforce feelings, making conduct worse, or it can calm and de-escalate a situation. Focus on addressing the individual's needs in the interaction.

- Treat the person respectfully
- Make a conscious effort to stay calm
- Approach in a warm, friendly, open manner, avoiding confrontational body language such as crossed arms and standing too close
- Maintain good but non-threatening eye contact
- Use facial expressions and nodding to convey attentiveness and understanding, communicate understanding and willingness to listen
- Speak softly and clearly with warmth and assurance
- Speak in simple language, use short sentences, but be careful not to "talk down" to the client
- Remove the client to a private area of the practice, this could be a quiet corner away from others or a private room depending on the client- always leave an escape route for yourself
- Where possible, avoid distracting activities such as writing or looking at the computer screen
- Show compassion and use considerate gestures such as offering a glass of water
- Ask open ended questions to find out the problem from the client's point of view
- Acknowledge the importance of the issue
- Give a clear message that: You want to help, you understand

Once you have listened it should be possible to explore solutions. Do not promise what cannot be delivered, rather explain what can be done, and provide choices of solutions. In many cases a calm, respectful and helpful approach is enough to de-escalate early aggression. This client centered attention needs to continue for the entire visit.

Customer Service
PROFESSIONAL BOUNDARIES

PROFESSIONAL BOUNDARIES

Purpose

The purpose of this policy is to provide guidance for appropriate actions to maintain professional relationships between practitioners, staff and clients / families.

Definitions

Professional boundaries are the limits to the relationship of an employee and a person in their care which allow for a safe, therapeutic connection between the staff member and client (and their nominated family, carers and friends), protecting both staff and client / family.

Boundaries are the lines that separate the professional from non-professional relationships.

Power imbalance is the difference in power relations between an employee and the clients in the practice. This can be due to the vulnerability of the person, the sensitive information employees have access to, or the role of the employee in providing or giving access to the care the client needs.

Therapeutic relationship is the relationship between practitioners, staff and the client that promotes the client's safety, wellbeing, independence, and resilience, and promotes their interests above those of the practitioner and staff.

Policy

[BusinessName] sets and maintains a high standard of professional conduct for practitioners and staff, who are responsible for maintaining professional boundaries in their day-to-day work with clients and families.

[BusinessName] strives to create a safe and supportive environment for all clients, their families or carers who access services. In the process of providing client care, the practice acknowledges the value and importance of practitioners and staff building rapport and appropriate professional relationships with the client / family.

Healthcare workers have a duty of care to treat clients with respect and provide client-focused support that meets their needs without judgment or bias. Employees must always remember that they play a role to support the client with their healthcare needs, while understanding that professional boundaries require the recognition of potential conflicts, risks and complexities of providing care to clients. This can occur for example in clients who have had lengthy, or frequent episodes of care.

Customer Service
PROFESSIONAL BOUNDARIES

PROFESSIONAL BOUNDARIES (CONTINUED)

Procedure

[BusinessName] practitioners and staff inform the clients and families about their roles, and what can be expected in the professional relationship to avoid misunderstandings.

Boundaries

- Employees must never give advice that is outside of their training and expertise
- Practitioners visiting clients at home must do this for work-related purposes only
- Requests by clients for practitioners to visit at home outside of scheduled appointments or for non-work related reasons will be declined
- Social relationships between employees, clients and their family members are generally considered to be inappropriate - this includes friendship, social engagements, contact via social networking sites or other electronic means, or entering any other relationships apart from a professional one
- An employee will declare to their manager / senior practitioner if there is a pre-existing personal or social relationship (acquaintance, friend, relative connection, etc.) with a client or their family
- Practitioners are discouraged from treating other employees in the practice (unless in an emergency with no other options)

Despite best efforts to maintain professional relationships, boundaries may be crossed and may lead to strains or a breakdown in relationships.

Some signs of compromised boundaries are:

- Setting aside time outside of work to assist a client
- Possessive or secretive actions, such as becoming defensive in matters relating to a client, or not sharing information with managers
- Judgemental attitudes (leading to withholding of support, criticism, or abuse towards the client)

Therapeutic Relationships

- Practitioners are aware that they are responsible for providing therapeutic support that is goal-oriented and planned to meet specific needs
- Be mindful of the power imbalance that exists, which may make the client more vulnerable in the professional relationship
- Support must always be client-focused and inclusive
- Employees must behave and make decisions with the best interests of the client in mind, and refrain from crossing boundaries of the professional relationship
- Employees should avoid having non-clinically related physical contact with clients, as this can easily be misinterpreted

Customer Service
PROFESSIONAL BOUNDARIES

PROFESSIONAL BOUNDARIES (CONTINUED)

Request and Disclosure of Information

- Employees will avoid requesting information that is not necessary for the purposes of providing care
- Employees shall not disclose any unnecessary personal information relating to themselves or others

Accepting and Giving of Gifts

- Gifts should not be exchanged between employees and clients, however, it is understood that in certain situations, cultures or contexts, the refusal of gifts could appear as offensive and may damage the established working relationship. In these cases, gifts may be accepted to the amount $XX.XX, not conditional upon any action or services being rendered, and nothing is expected in return.
- When it is necessary to accept gifts, employees should state they are accepting on behalf of the team to remove the personal element

Prohibited Relationships

While providing care, employees may develop personal feelings for clients and vice versa. Employees must remember it is their responsibility to conduct themselves professionally and maintain professional boundaries with the clients they care for.

Some examples of relationships that are prohibited are:

- Personal relationship (being friends, assuming the role of a parent / guardian)
- Any sexual relationship
- Financial or business relationship (entering into contracts, giving, or lending money)

Employees must never seek out relationships with former or current clients, and will use caution with exchanging messages and making connections on social networking sites and other electronic means of communication.

Disciplinary Action

Where there has been a report of a possible professional boundary breach, the matter will be investigated and may result in disciplinary action. The severity of the disciplinary outcome will depend on the seriousness of the breach.