

Inbound Call Script: Equipment Issue

Opening:

"Thank you for calling My Best Home Care, this is [Your Name]. How may I assist you today?"

If the patient reports an issue with their equipment:

"I'm sorry to hear you're experiencing issues with your equipment. Let me assist you with that."

Step 1: Verify Patient Information

"For compliance and to access your record, may I please have the patient's full name, date of birth, and current address?"

Step 2: Gather Details About the Issue

"What equipment are you having issues with?"

"Can you please describe the issue you're having with the equipment?"

"When did the problem start?"

Once the details gathered. Do a quick recap.

- TS - Ask the patient or caregiver if they are currently available and in front of their equipment to assist with basic troubleshooting.

Ask the PT or the caregiver:

"Are you in front of the equipment, or is someone available to do the troubleshooting right now?"

If YES:

Inform them that our Respiratory Therapist (RT) will call them back within one hour to assist with troubleshooting.

"Thank you for sharing those details. I'll make sure our technical support team reviews this so we can get it resolved for you. One of our specialists will reach out within an hour after this call."

"Kindly ensure your line remains available and that you're with your equipment so we can proceed without delays once the call begins."

If NO:

Inform the patient or caregiver to contact us back once they're available.

"Please, call us back once you're available and in front of the equipment so we can have someone to assist you further."

"If you're unable to be with the equipment, may we kindly ask if there's someone currently there who can assist on your behalf—like a nurse, caregiver, or another family member? If so, could you please provide their name and contact number so we can reach out and assist directly?"

Step 3: Escalation to Equipment Trouble shoot thread

Agents will report it to the thread.

In the chat always include:

FORMAT:

Patients name:

Caller info, name and phone number:

Brief summary of the reported issue:

Warranty Y/N (include the end of warranty):

(Need to create additional training for PT

owned equipment)

Patients name: Wollam, Cynthia

Caller info, name and phone number:

545+64+6+61

Brief summary of the reported issue. CAD

Power button is not working properly. Last night.

Warranty Y/N: Y 12/16/26

Reminder: identifying if under warranty (1 yr from the dispense date from the orders tab)

Step 4: Closing

"Is there anything else I can assist you with today?"

"Thank you for calling My Best Home Care. Have a great day and stay safe."

Inbound Call Script – Resupply Request

Opening:

*Thank you for calling My Best Home Care, this is [Your Name].
How may I assist you today?*

(Wait for the patient to mention they need a resupply of equipment/supplies.)

Step 1: Verify Patient Information and Pulling up Pt's Account

*Sure, I'd be happy to help with that. May I verify a few details first for compliance?
Can I have the patient's full name, date of birth, and the address on file?*

(Confirm and match details with the BT.)

Step 2: Check Eligibility

Thank you for verifying that. Please allow me a moment to check the patient's account (place the call on hold for 1-2 mins only.)

(Check the most recent Date of Service in your system.)

- **If Eligible:**

It looks like you're eligible for a resupply. I'll go ahead and help you place that order today.

- **If Not Yet Eligible:**

*Based on our records, your next eligible date for resupply is [Date].
You may call us 2 weeks before that date to place your order.*

Step 3: Confirm Supplies (Long list or short list of supplies)

- We will use and offer Klara for order confirmation
- IF the pt declines proceed taking and confirming the resupply order over the phone

Reminder:

1. Check all the documents of the PT (Auth, Progress Notes, and Prescription)
2. Check the previous list of supplies from the notes.

"Regarding your resupply for this month, I'm reviewing your previous orders to ensure that I provide the most accurate and appropriate resupply list via Klara. We will send you the list of your supplies, and all you have to do is confirm it so we can proceed with processing your order."

Exception: We can offer Klara for order confirmation if the patient doesn't know the name of the supplies they would like to order.

If the patient didn't confirm their supplies via Klara, escalate the concern to your assigned thread.

Reminder: Check the previous list of supplies from the notes.

If the patient is not familiar with Klara, please educate them about what Klara is.

"Klara is a way for us to confirm your supplies"

through a text message. You simply click the link in the message, and once it opens, you can review the list of supplies I'm providing and approve it."

For the resupply process over the phone, in case the patient or caregiver does not agree via Klara, proceed with taking their confirmation verbally and document it accordingly

Suggested Script

I will now go over the list of supplies with you. Kindly let me know if you approve the items or if there are any changes you would like to make. Let's review them together.

Step 4: Shipping Information

Your supplies will be shipped to [confirm address]. Is that still correct?

Reminder: Always check it to BT (Personal tab) to confirm the delivery address of the pt.

Step 5: Setting of Expectation

Step 6: Closing the Call

Is there anything else I can assist you with today?

Thank you for calling, My Best Home Care and have a great day!

Inbound Call Script – Scheduling (Tank Refills, RT Visits, Home Setup, etc.)

Step 1: Agent Opening:

“Thank you for calling My Best Home Care. This is [Your Name], how may I assist you today?”

Step 2: If the patient requests for tank refill, RT visit, home setup, or any scheduling request:

“I can assist you with that. May I please have the **patient’s full name, date of birth, and complete address** to verify the account?”

“Thank you for confirming. May I know the purpose of the visit? (e.g., home assessment, oxygen setup, equipment issue?”

Things to get if only they’re req for O2 tanks (need to ask)

- How many tanks have empty
- size of tank can be seen on BT (notes)
- Delivery address

Once verified, respond accordingly:

Tank refills Script:

“Thank you for confirming. I’ll go ahead and coordinate with our scheduler about the availability to get an appt. Once we get the confirmation, we’ll get back to you. “

If patient is **pushy**.

“I understand this is urgent let me coordinate this to our scheduler and give you a call back as soon as I can”

Submit O2 visit, RT visit and request to Scheduling thread via MSteams

Name of the patient, del add (include the city), Reason of scheduling and preferred time of the pt

Tracey will send the availability of the schedule (effectivity will be the following day) on the Scheduling thread via MSteams

Visit is for 2 hrs window and quick pick up is 2 hr window

Format note:

Name of pt / City they live in/ Contact person’s name:

O2 refill size:

Preferred time of home visit date and time:

VARGAS, SKYLER J / Stockton, CA / Talked with Ivy (MOP) and she would like to get filter for o2 concentrator / o2 E / Available today all day and all day Thursday and Friday

Before Ending the Call:

“Is there anything else I can help you with today?”

→ If no further concerns:

“Thank you for calling My Best Home Care. Have a great day and take care!”

Left a comment on BT

Sample format

Patient Note

Cancel
Save
New
Print
ElectronicFax
History

General

Note ID
Created By Fernandez-Arztate, Marisa
Date Created
Actual Date 6/25/2025
Assigned To Fernandez-Arztate, Marisa %X
Date Noted 6/25/2025
Status Open
Date Complete

Note Type Patient
Note Reason Patient General Note (Patient)
Severity Low
User 1
User 2
State Unlocked
☐ Acknowledgment Required
☐ Deactivate Note

Related Sales Orders and Invoices

Add Sales Order(s)
Add Invoice(s)

Sales Orders

Order ID	Schedule Date	Actual Date	Status
No Records Found			
<div> <div> 1 </div> <div> Page size: 5 </div> <div> 0 items in 1 pages </div> </div>			

Invoices

Inv #	Inv Status	Insurance	DOS
No Records Found			
<div> <div> 1 </div> <div> Page size: 5 </div> <div> 0 items in 1 pages </div> </div>			

Details Status

Saved By N/A
Date Saved N/A

Lock Status
Locked By
Date Locked

Details

Subject Patient Note
Description MOP called in to request refill of 3 E tanks. Available **Today** after 2pm

Inbound Call Script – General Inquiries

Step Call 1: Opening

"Thank you for calling My Best Home Care. This is [Your Name], how may I assist you today?"

Step 2: Listening and Clarifying

Customer: States their concern

"Thank you for sharing that. Just to make sure I understand correctly, you're calling about [repeat key part of concern] is that right?"

Step 3: Acknowledge and Verify the pt account

"Your concerns are valid, and I'm glad you reached out."

"Before we proceed, for privacy and security, I need to verify a few details to confirm your identity.

Can you please provide your full name, date of birth, and the address we have on file?"

If unclear, probe gently to identify the concern:

"Just to make sure I understand, you're calling about [resupply update / an issue with your last shipment / confirming our fax number / checking if we provide a certain service], correct?"

3. Categorize & Proceed Based on the Call Type

A. Resupply Updates

"Let me check the status of your recent resupply order. May I have your full name and date of birth to access your account?"

Steps:

1. Authenticate patient.
2. Check order date, shipment status, and tracking.
3. Provide update clearly:

"Your last resupply order was shipped on _____ and expected to arrive by [ETA]."

⇒ If not yet processed:

"It looks like the order is still being reviewed. I'll forward this to our resupply team (escalation) to prioritize it, and you should receive an update soon."

B. Reporting Issues With Resupply

"I'm so sorry you're experiencing this. Let me help you fix it right away."

Steps:

Gather details: What item is missing/incorrect/damaged?

Confirm if delivery was received.

Offer next steps:

"I'll document this for our resupply team and request a correction. Someone will reach out shortly."

C. Fax Number Confirmation

"Absolutely, I can help with that."

Response:

"You can fax documents to us at 408-934-9617 MBHC fax: 408-934-9607. Please include the patient's full name and date of birth for reference."

D. Inquiry About Services Not Provided

"Thank you for checking with us."

Response Template:

"We specialize in home respiratory supplies and equipment. Unfortunately, we do not provide [e.g., home nursing, physical therapy, diabetic supplies]. You might want to check with your insurance provider or primary care physician for recommendations."

4. Offer Additional Help

"Is there anything else I can assist you with today?"

5. Closing the Call

"Thank you for calling My Best Homecare. We're here to support your respiratory needs—take care and have a great day!"

LEGACY PSR TEAM

MEDICARE	CARE ADVANTAGE	MEDI-CAL	MANAGED CARE	PRIVATE	HOSPICE
Marisol 1. Katherine Tracey 1. Souradeep I Debzynti B.	Marisol 1. Gems Estacio 1. Souradeep I 2. Debzynti B.	Jessa 1. John Palma 2. Peter Gutierrez 1. Patrick B 2. Kashif K 3. Ayon G 4. Anurag R.	Isabel 1. Jesus Rojas 2. Jovily Corpuz 1. Savantan S 2. Soumit C	Marisa 1. Jefferson Buena 1. Bhaskar B. 2. Siddharth K.	Marisa 1. Jefferson Buena 1. Bhaskar B. 2. Siddharth K.

TASK ASSIGNMENTS

US	MAGELLAN	SK
1. Inbound phone calls. 2. Scheduling 3. New Orders 4. Escalation requests 5. Follow up on troubleshoots or on-calls 6. Review RT email reports	1. Outbound monthly follow up phone calls. 2. Inbound phone calls. 3. Direct troubleshooting phone calls. 4. Process patient requests for monthly resupplies . 5. Assist with Scheduling	1. Monthly insurance verification. 2. Renew insurance authorization. 3. Renew DWOs, VSC, Notes 4. Create Resupply Sales Orders. 5. Check and EMR PODs.

Sample of note template for Inbound Calls

Subject	Patient Note - Inbound call
Description	Spoke with: Concerns: Resolution

EXTENSIONS	
Brisa SFS	121
Camellia SFS	113
Francisco	145
Isabel	125
Jessa	
Jose B.	102
Justine	500
Kristen	101
Linda	502
Maria	116
Marisa	144
Marisol	108
Mary	105
Mike SFS	512
Sac RT	503
Tracey	110
Trinh	210
Warehouse	505
Whitney	201

VM Script:

"You have reached _____ at My Best Homecare. I am either on the phone or away from my desk. If this is a medical emergency, please hang up and call 911 immediately. Please leave a message with your name, phone number and the best time to reach you back and I'll be sure to get back to you. Thank you for calling and have a great day."

Inbound Ghost Call Script**Upon answering the call and receiving silence:**

"Hello? Thank you for calling My Best Home Care, this is [Your Name]. How may I help you today?"

[Pause for 5–10 seconds]

Second prompt:

"I'm not hearing anything on the line. If you're there, please say something so I can assist you."

[Pause again for 5–10 seconds]

Final Prompt:

"It seems I'm not able to hear you at the moment. If you're having trouble with the line, please feel free to call us back at (408) 934-9617 and enter my extension number _____. I'll go ahead and end the call for now. Thank you, and take care."

Offshore script if it's a different insurance.

Step 1: Opening

"Thank you for calling My Best Home Care. This is [Your Name], how may I assist you today?"

Step 2: Collate the data of the PT.

"Thank you for sharing that.."

"Before we proceed, for privacy and security, I need to verify a few details to confirm your identity.

Can you please provide your full name, date of birth, and the address we have on file?"

Step 3: WARM TRANSFER

If the insurance is not assigned to you, please transfer the call to the offshore agent responsible for handling the concern.

"Based on what you've shared. I'll be transferring your call to the appropriate person who is best equipped to handle this type of concern. Kindly stay on the line while I connect your call.."

Agent (to the offshore agent):

"Hi [Offshore Agent's Name], I have (name of Contact person / patient's Name), I'll be transferring the call to you"

STEP 4: Get back to the Patient and set their expectation

Agent (to the patient):

"Thank you for waiting, and I will now transfer you."

Out of scope Script or Escalation:

Step 1: Opening

"Thank you for calling My Best Home Care. This is [Your Name], how may I assist you today?"

Step 2: Collate the data of the PT.

"Thank you for sharing that.."

"Before we proceed, for privacy and security, I need to verify a few details to confirm your identity.

Can you please provide your full name, Pt name, date of birth, and the address we have on file?"

Reminder: Make sure to notate all the necessary information before performing a warm transfer to the onshore agent assigned to you.

Step 3: WARM TRANSFER

Based on what you've shared. I'll be transferring your call to the appropriate person who is best equipped to handle this type of concern. Kindly stay on the line while I connect your call."

Agent (to the onshore agent):

"Hi [Onshore Agent's Name], I have (name of Contact person / patient's Name), I'll be transferring the call to you"

STEP 4: Get back to the Patient and set their expectation

Agent (to the patient):

"Thank you for waiting, and I will now transfer you."