



Toward  
Optimized  
Practice

## Scripting Elements

Consider the following elements for scripting:

1. Briefly review the patient chart beforehand, as it may not always be appropriate to phone  
*Example: patient has dementia, language barrier, etc.*
2. Consider your language – will the patient understand what you’re talking about? Are the words you’re using familiar to them?  
*Example: “routine tests to keep you healthy and well” vs. “preventive screening maneuvers”*
3. Make sure you are speaking to the patient before you continue.
4. Identify who you are and the doctor you’re calling on behalf of.
5. Be clear that the purpose of your call is not urgent – it’s a routine part of their care.
6. Don’t imply that you’ve been in their chart – the doctor reviewed it.
7. Be clear about what is expected of the patient, for example:
  - a. Call back and ask for this person at this number between these times
  - b. Come to the clinic to pick up a requisition
  - c. Make an appointment with the physician or a care team member
  - d. Make an appointment at the lab/diagnostic imaging within a certain timeframe
8. Consider using key points versus a word-for-word script so that you sound natural.
9. Your script document could have ideas for handling different situations, should they arise.  
*Example: answering machine, chatty patient, clinical questions, etc.*