

# What's That Call Checklist

Check the box to the left if the agent...

- ☐ Provided name and organization name/Pod name.
- ☐ For the outbound call, provided notification that call is being recorded for quality and training purposes.
- ☐ Sounded friendly and warm.
- ☐ Verified the patient name plus two other identifiers. Example: ZIP Code, Phone Number, Address
- ☐ Confirmed the reason for the call.
- ☐ Confirmed the PCP/Referring Provider.
- ☐ Confirmed the phone number for appointment reminders.
- ☐ Confirmed MyChart status.
- ☐ Used an appropriate pace on the call.
- ☐ Provided all information needed for the next step (for the appointment, etc.).
- ☐ Asked questions to clarify .
- ☐ Expressed empathy throughout the call.
- ☐ Did not interrupt the caller and was always professional.
- ☐ Spoke confidently and in a positive manner.
- ☐ Confirmed an understanding of next steps with caller.
- ☐ Asked caller if he/she had any other needs/questions.
- ☐ Thanked the caller for calling Yale Medicine.

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