



## Make Appointments during the First Call

### Problem

Staff and counselors spend too much time returning phone calls to make appointments with clients. There are often delays returning phone calls

### Solution

Make an appointment or get a commitment from the client to walk in during the first call requesting treatment.

### Featured Stories

**St. Christopher’s Inn** in Garrison, New York answered more than 80 percent of calls live and returned phone calls within 10 minutes by prioritizing incoming phone calls. They changed their phone routing system so that callers are presented with three options in priority order: if seeking treatment (press 1), if a referring agency (press 2), and if seeking information (press 3). They answered priority 1 calls live whenever possible and returned priority 2 and 3 calls, if necessary. They staggered admissions office lunch schedules so that someone was always available to answer phones during the lunch hour.

**Kentucky River Community Care** in Jackson, Kentucky decreased the call volume in the front office from 1,000 to 150 calls per day by providing a direct line for clients requesting an appointment, by relocating the switchboard to a private area, and by routing clinical and business calls to different locations. These changes decreased the number of clients who needed to leave a voicemail, were told to call back later, or were transferred to another extension, to zero. Clients calling for an appointment now reach the appointment scheduler directly and front office staff has more time to focus on clients who are actually in the office.

### Lessons Learned

- Do a walk-through of what happens when you call your agency. Call all phone numbers listed for your agency, including those listed in the phone book, on brochures, on the Internet.
- Explore ways that the telephone system can streamline call routing.
- If walk-in appointments are available, include a recording that provides instructions.

### Tracking Measures

#### Cycle Measure

The number of return phone calls made to clients to make an appointment

#### Data Collection Form

None

### Action Steps

- Plan** 1. Collect baseline data for the number of return phone calls made to clients to

#### NIATx Aims

- ✓ Reduce waiting time
- Reduce no-shows
- Increase continuation
- Increase admissions

#### Financial Impact

- ✓ Increase revenue
- Increase staff retention
- ✓ Reduce costs



## Promising Practice

make appointment.

2. Explore ways of using the telephone system more effectively so that clients can make an appointment during their first call.

### Do

3. For the next two weeks, make an appointment or get a commitment to walk-in from clients during their first request for service.
4. Re-count the number of phone calls made to make appointments.

### Study

5. Check the fidelity of the change. Was the change implemented as planned?
6. Evaluate the change:
  - Did more clients make appointments or commit to walk-in on the first call?
  - Did counselors and other staff members spend less time making appointments?
  - Did clients need to call fewer times to make an appointment?
  - How did clients react to immediately being scheduled for an appointment?
  - Did the number of calls required to make an appointment decrease?

### Act

7. If necessary, adjust the way that clients are offered appointments or asked to commit to walk-in on their first call for service and re-test this promising practice for an additional two weeks.

Repeat this series of steps until all clients are scheduled for an appointment during their first call for service and all callbacks to make appointments are eliminated.

### Related Promising Practices

- [Centralize Appointment Scheduling](#)

### More Stories

**Asian Counseling and Referral Service** in Seattle, Washington uses a paging system to page a screener to talk to clients on the phone or to see walk-in clients immediately. This eliminated the need to return phone calls to make assessment appointments.

**Specialized Outpatient Services** in Oklahoma City, Oklahoma reduced the waiting time for assessment from 15 days to 3 days by installing a new phone system and adding more lines to increase accessibility, efficiency, and availability of open lines. They also suspended financial requirements, [cross-trained counselors](#), added groups, and [used all time slots](#).

**Addiction Resource Center** in Brunswick, Maine reduced waiting times from 11 days to 2 days by redrafting their phone screening script using ASAM criteria. This helps them quickly identify the treatment path appropriate for the caller: intensive outpatient, outpatient, or detoxification/ER. This also eliminated unwritten rules like not talking to the caller if intoxicated or if someone other than the client was calling. For more information, see the [business case](#).