



Escalation Management

RNs, Assistants and Reception Staff

Shift Managers: Mariah

General Management: Patty

Level 1 : Room Temp – Assistant/Reception Staff

Missed Appointment Inquiry

Step 1: Listen to their reason and never argue with. Acknowledge their story and thank them for sharing it with you. Inform them of our 24 hour cancellation policy “Thank you for your inquiry. Unfortunately we do have a 24 hour cancellation policy. You have the option of letting the system charge a session or simply pay the \$25-\$50 cancellation fee to cover your nurse’s time.”

Step 2: Ask them which they’d prefer “Would you like to reinstate your sessions or leave it as is?”

Step 3: Charge the late fee (\$25 small/med, \$50 Lg/XtraLg) or simply deduct a session. Note: Please always try to deduct a session if they have any first. Charge only if they don’t have sessions or if they choose to pay the fee and reinstate a session.

Late for An Appointment (50% of appointment time or later)

Step 1: Listen to their reason and never argue with. Acknowledge their story and thank them for sharing it with you and let them know you’re going to try to make it work.” “Thank you for calling. Let me see what we can do for you.”

Step 2: Check with other nurses, look at schedule and see if they can still be serviced.

Step 3: If they can not be serviced, explain you did your best to accommodate them. Ask them if they’d like to reschedule and charge the session.

Level 2: Tepid – Assistant/Reception Staff

Session Inquiry Because They Think Counts Are Off

Step 1: Pull up profile and **check** Account Details with them. Show it to them on the screen if they want to see it.

Step 2: Ask them if it's correct. If not refer to a shift manager.

Not Getting Email/Text Reminder

Step 1: Apologize for any frustration.

Step 2: Tell them, "Let me check your communication logs in MindBody (under their profile)." Confirm their email spelling and confirm their phone number. See if any emails or texts bounced or were rejected (in red on the communications log)

Step 3: check to make sure their text/email reminder boxes are checked off in their profile under the contact log.

Level 3: Warm – Shift Manager

Problem w/Session Counts

Step 1: Apologize for any frustration.

Step 2: Tell them, "Let me check your communication logs in MindBody (under their profile)." Confirm their email spelling and confirm their phone number. See if any emails or texts bounced or were rejected (in red on the communications log)

Step 3: Check to make sure their text/email reminder boxes are checked off in their profile under the contact log. Ask them if they're getting all their reminders.

Step 4: Ask them if they'd like you to email them a list of their visits. Copy and paste their visits from the Visits screen into an email for them and let them know you're sending to them for their reference.

Problem w/Paying Late Cancellation Fee

Step 1: Apologize for their frustration. Explain the nurse are contractors and we simply need to honor the time they've set aside for them to do the client's treatment as follows, "So sorry for any frustration. We do our best to always create balance for both the client and the nurses serving them. That's why we do maintain a 24 hour cancellation policy. That ensures we have time to call clients from our wait list if

another client can't make it. The late fee simply covers the time nurse set aside for your treatment.

Step 2: Ask their preference, "Would you rather hold on to all your sessions and just pay the fee or simply have the system deduct one?"

----- **ANYTHING BELOW THIS LEVEL GOES TO PATTY** -----

Level 4: Hot

Problem Insisting Not Paying the Late Fee
Problem w/Service
Problem w/Staff Member
Issues w/Booking Times or Getting Preferred Nurse
Wanting a Better Deal

Level 5: Scolding

Becoming Hostile or Rude
Asking to Speak to a Manager
Threatening to Write a Bad Review