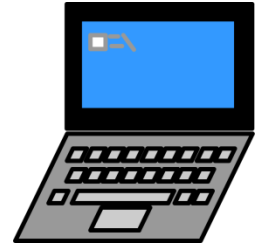


Tip Sheet #2:



Telephone and E-Mail Tips

- ❖ Always have a pen and paper with you before calling. (It is a good idea to keep information in a notebook you are using to collect information.)
- ❖ Identify yourself and state your child's name. Be sure to note the person to whom you spoke with as well as the date and time. Also ask for an email address should further contact be necessary.
- ❖ State the reason you are calling:
 - I'm calling for information about....
 - I would like to make an appointment for....
 - I was told to call your office by (name) from (agency)
 - I am returning (name)'s call for (reason)
- ❖ Be prepared. Describe what you or your child needs. Have information available the person helping you may need: insurance information, name of pediatrician, case manager, social security number.
- ❖ Take brief notes of your conversation so that you may ask questions. If you do not understand what is being said, ask for an explanation.
- ❖ Follow up:
 - Find out if and when you need to call back.
 - Let staff know times that are best for them to reach you.
 - Write down any appointment or office visits you will need to make.
 - Ask what papers, documents or other information you will need.
 - If information is being sent to you, ask when you can expect it to arrive.
 - Email for an appointment if you have unresolved issues.
 - Send a thank you email to the person with whom you spoke, summarizing the conversation, so they can get back to you if their understanding of the conversation was different.