



Taking Messages

1. To take the messages, use the carbon copy message books provided at the CSR station. **Do not use Post-it notes.**
2. When taking a message be sure to collect as much information as possible.
3. You must take down the client's name, patient's name & ID, the phone number, and what questions or requests they have.
4. Write your initials on all messages so that the individual it is meant for knows where to go with questions about the phone call or conversation.
5. Place tech messages on the tech board.
6. For hospitalized patients, place the message on the hospital board
7. For refill requests, place the message on the pharmacy board.
8. For doctor messages, place the message on the doctor's board. Ensure that you are placing the message on the correct doctor's board.
9. **You must create a client communication in the client's file as well.**