

# Using Doximity to Call Patients

This guide provides instructions for using the Doximity Dialer, an application that hides your personal phone number, to contact patients from your personal mobile phone

## First-time Setup of Doximity Dialer

Doximity is an application that allows you to set your “caller ID” to the number for your clinic so that patients will not see your personal phone number. When you call patients from your personal mobile phone, please use the Doximity Dialer.

## Register for a free Doximity account

### Computer (Desktop or Laptop; PC or Mac)

1. Visit [doximity.com/care\\_team/](https://doximity.com/care_team/)
2. Select **Sign Up**.
3. Enter your first and last name. Select **Find My Profile**.
  - a. If you’ve used Doximity in the past, your profile will appear. Select your name, then select **Yes, this is me**.
4. If you’ve not registered for Doximity in the past, click **Don’t see your name? Select to create a new account**.
5. Follow the prompts to create your profile, verify your identity, and complete registration.
6. You will be prompted to add details to your profile, such as uploading a headshot to your profile, adding your work experience, and adding people to your network. You may complete these steps or skip them.
7. Navigate to your email inbox.
8. Locate the email from Doximity called **[ACTION REQUIRED]: Confirm Your Doximity Account**
9. Follow the email prompts to confirm your account.

### Mobile Device (iOS or Android; mobile phone or tablet)

1. On your device, launch the Google Play Store (Android) or App Store (iOS/Apple devices)
2. Search for the application **Doximity**
3. Download the application (it’s free)
4. Open the application
5. Select **Register**
6. Enter your first and last name. Select **Find My Profile**.
  - a. If you’ve used Doximity in the past, your profile will appear. Select your name. Then, select **Yes, this is me**.
7. If you’ve not registered for Doximity in the past, click **Don’t see your name? Select to create a new account**.
8. Follow the prompts to create your profile, confirm your identity, and complete registration.
9. Under **Join a Physician’s Care Team to Use Dialer**

## Join a Care Team Using a Desktop or Laptop Computer

View Doximity’s Set-Up Guide, [How to Join a Care Team in Doximity Dialer](#), for screenshots, and follow the steps below.

1. Visit [doximity.com/care\\_team/members](https://doximity.com/care_team/members)
2. Search for your physician by First and Last Name

- a. If your physician is not registered on Doximity, please send them this link:  
[doximity.com/clinicians/download/dialer](https://doximity.com/clinicians/download/dialer)
3. Select your physician
4. Select **Join Care Team**
5. Once you've successfully joined a Care Team, you will see a confirmation message

## Setting up Dialer in the Doximity App

1. Open the Doximity application on your mobile phone
2. Tap the Dialer phone icon at the bottom of the Doximity app
3. You'll be prompted to set up Dialer. Tap "Link My Phone."
4. Tap the "Call" button to set up your device.
  - a. This will set up your device by calling a phone number.
  - b. You will hear an automated recording letting you know set up is complete.
5. You will see a confirmation message. Tap "Let's do it!" to start using Dialer.

## Add Your Office Number(s) as Caller ID

6. The numbers on the top of your screen is what your patient will see on their Caller ID when called.
7. To edit your office numbers, tap Settings.
8. Tap "Add Caller ID" or "Edit"
9. Enter nickname and phone number, then tap "Save" to store.

## Using the Dialer to Call Patients

### Calling Your Patients on Dialer

1. Choose the number you would like to display on your patient's Caller ID. Use your provider's office phone number.
2. Dial your patient's number by tapping on the green phone icon.
3. Tap the "Call" button to place call.
  - a. Note: Dialer uses a (415) bridge phone line to connect to your patient's phone number. You will still be routed to their phone number from Step 1.

## Need additional support?

- Visit Doximity's [support website](#) for additional information and support.

## Virtual Visit Scripting and Encouraging Patient Gateway Enrollment

### Telephone Virtual Visit Scenario

Use the following scripting when calling a patient to indicate their appointment has been changed from an in-person visit to a virtual telephone visit.

#### Scheduler's Script:

**Greet patient:** “Due to the COVID-19 pandemic and social distancing, we are going to reschedule your appointment from an in-person visit to a virtual visit. We are scheduling virtual visits where possible to keep you and other patients safe and remove the need to come into the office. Your doctor will be calling you at <<Date/Time>>. Please confirm this is the best number to reach you (*get best contact number and update in Epic*).”

“This virtual phone visit is being used during the COVID-19 crisis in place of an in-person visit and will be billed in a similar fashion. You could have copay, coinsurance, or deductible responsibility.”

**Verify patient's status on Gateway:** *if patient is already enrolled, no further action needed. If not enrolled, work to enroll immediately.*

“I noticed that you are not currently enrolled in Partners Patient Gateway. Your provider has asked that you enroll to ensure you receive the most up-to-date information about your care. I'm happy to help you enroll right now.”

“All we need to do to get you enrolled is to send you a link, and once you click on that link you'll be taken to the Gateway website. Would you like to receive that via e-mail or text? (Follow the steps in the [tip sheet](#) and send the link). Once you click on the link, you'll be asked to verify your identity, create a user name and password, and accept the terms and conditions. Would you like me to stay on the line and provide assistance while you enroll?”

### Video Virtual Visit Scenario

Use the following scripting when calling a patient to indicate their appointment has been changed from an in-person visit to a virtual video or Epic integrated video visit.

#### Scheduler's Script:

**Greet patient:** “Due to the COVID-19 pandemic and social distancing, we are going to reschedule your appointment from an in-person visit to a virtual visit. We are scheduling virtual visits where possible to keep you and other patients safe and remove the need to come into the office. Do you have a smartphone, tablet, or computer with a camera?”

- **If yes:** “We will be sending you a message via Patient Gateway (if enrolled) or email with instructions on how to join your scheduled virtual visit. This virtual video visit is being used during the COVID-19 crisis in place of an in-person visit and will be billed in a similar fashion. You could have copay, coinsurance, or deductible responsibility.”
- **If no:** use the scripting for the telephone virtual visit scenario above

**Verify patient's status on Gateway:** *if enrolled, no further action needed. If not enrolled, work to enroll immediately using scripting below.*

“I noticed that you are not currently enrolled in Partners Patient Gateway. Your provider has asked that you enroll to ensure you receive the most up-to-date information about your care. I'm happy to help you enroll right now.

All we need to do to get you enrolled is to send you a link, and once you click on that link you'll be taken to the Gateway website. Would you like to receive that via e-mail or text? (Follow the steps in the [tip sheet](#) and send the link). Once you click on the link, you'll be asked to verify your identity, create a user name and password, and accept the terms and conditions. Would you like me to stay on the line and provide assistance while you enroll?”