

# How to provide key information during initial telephone and email enquiries

You should ensure that your customer services/customer facing staff members are trained to provide enquirers with key information about your care home and the services it offers, and are able to communicate this information to any potential resident and their representatives who enquire about a possible placement – whether that be by phone or email. Your staff should also be able to answer any questions a person may have.

You should endeavour to provide all of the key information in response to initial enquiries made by phone, for example by ensuring your call handlers have an appropriate script. But there may be occasions when enquirers ask for some very specific information only.

This advice sheet intends to help guide staff through that process.

## Initial telephone enquiries

1. Listen carefully to your caller's enquiry.
2. Tell them that to help them decide whether your home is suitable, you have some key pieces of information you would like to share.
3. Explain that all this information can be sent to them via email or post, and can also be found on your website (where you have one), and ask if they have a pen and paper to hand. Then briefly cover the following:
  - a. **What type of funding arrangements you accept for potential residents – that is confirmation of whether you accept:**
    - i. Those who pay for their own care
    - ii. Those who receive funding in whole or part from their local authority
    - iii. Those who receive funding from the state, such as the NHS
  - b. Some **key features** of your service, such as:
    - i. **The care needs you cater for**
    - ii. **An overview of the rooms, facilities and services residents can expect**
    - iii. The size of your home
  - c. Your home's **latest inspection rating or grade** given by your regulator
  - d. **Any particularly surprising or important terms and conditions, such as:**
    - i. **Any minimum period that a resident must pay for their own care**
    - ii. **If a resident is paying for their own care, how their fees may change during their stay**
    - iii. **Any requirement you may have for a guarantor**
  - e. **Fees and charges**
    - i. An indication of the **total weekly fee rates** you charge residents who pay for their own care, for each type of care service you offer
    - ii. What services are included in the weekly fees
    - iii. Additional services that may need to be paid for separately, including any **significant, additional charges** – such as an escort for medical appointments
  - iv. A brief description of your home's staffing arrangements

- iv. Details of any **upfront payments required**, such as a deposit, including: the amount; what it covers and how it is refunded; and any weekly fees payable in advance of moving in
4. Once you have finished, offer again to provide them with the information in writing by posting it to them or sending as an attachment to an email, or if they prefer, where it can be found on your website, so they can read it at their leisure.
5. Ask if they have any questions, or if there is anything else you can help them with at this stage. If they have questions that require more detailed information, or they would like to know more about your home at this stage, answer those questions/provide this information too, and direct them to where your *important, additional information* sits on your website, or arrange for the information to be posted or emailed to them – for example, in an information pack.
6. At the end of the call, invite them to arrange a visit to your home at a later date if they would like to know more, or direct them to your website to find out further, additional information.

## Email enquiries

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All of the key information listed here should be supplied via email upon request. This could be done by emailing the enquirer a 'key facts' sheet (which could be at the front of a more detailed information pack also containing the important, additional information, or as an insert in a brochure) prominently highlighting the key information, or by placing this information in the body of an email or as an attachment.

## Remember!



You must not hide or conceal any of your key information, but actively make clear where it can be found



You must not supply false or untruthful information, or present information about your care home in a way that could be misleading. You must also ensure it is up-to-date



The information **highlighted in blue** must be given at this stage as a minimum