

A SELF-AUDIT FOR MEDICAL PRACTICES

The Spanish-Speaking Patient Experience

30 checkpoints, from the first search to the final bill, plus five test calls you can make this week. About an hour of work for a practice manager.

QUESTIONS ABOUT THIS GUIDE?

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For practice managers, office managers and owners of practices that serve Spanish-speaking patients.

BEFORE YOU START

What a Spanish-speaking patient actually gets

Most practices with Spanish-speaking patients know it matters. Fewer have checked what those patients get when they look the practice up, call at lunchtime, read a reminder text or open a bill.

The gaps are rarely in the exam room. They are at the edges: the phone menu that offers Spanish last, the one bilingual receptionist who is out on Fridays, the reminder that only goes out in English, the voicemail nobody returns in Spanish. Each one is small. Together they decide whether a patient books with you or with the practice down the street, and whether they come back.

This audit walks through the whole patient journey in six parts. It is written for vein and vascular clinics, plastic and cosmetic surgery practices and primary-care groups, but most of it applies to any practice.

How to use it

1. **Score each checkpoint honestly.** Tick Yes (2 points) only if it is true every day, not just when your best person is working. *Partly* is 1 point. *No* is 0.
2. **Make the five test calls** on page 7. They will change some of your answers. Most practices score themselves higher before the calls than after.
3. **Add up your score** on page 9 and pick three fixes. Not ten. Three you can finish this month.

ASK A SPANISH SPEAKER TO HELP

Several checkpoints can only be judged by a fluent Spanish speaker: whether a form reads naturally, whether the phone greeting sounds like a person, whether a text reminder makes sense. If you are not one, ask a bilingual colleague, friend or patient advisor to review those items with you.

Scoring at a glance

Score	What it usually means
50–60	Spanish-speaking patients get the same experience as everyone else. Keep testing; staff changes undo this quickly.
35–49	The basics are there, but there are days and hours when Spanish speakers hit a wall. Usually phones and coverage.
Under 35	Spanish-speaking patients depend on one or two people being available. You are likely missing calls and bookings that never show up in a report.

PART 1

Before they call

Patients decide whether to call you based on what they find first.

	CHECKPOINT	YES	PARTLY	NO
1	Your website says, in Spanish, that Spanish is spoken and how to reach a Spanish speaker. A line on the home page and the contact page is enough to start. If it is buried in a footer, patients will not find it.	☐	☐	☐
2	Your Google Business Profile and insurance-directory listings say Spanish is spoken. Many patients find you through a map search or their plan's directory, not your website. Check both.	☐	☐	☐
3	Online booking or the request form works in Spanish, or Spanish speakers have a clear alternative. An English-only form with no other option sends people back to the search results.	☐	☐	☐
4	Spanish-language ads and social posts lead to a Spanish speaker, not an English-only line. Common in cosmetic practices: the ad is in Spanish, the phone is answered in English. That is paying for a lead and then losing it.	☐	☐	☐
5	You reply to Spanish reviews in Spanish. Future patients read the replies. A reply in their language shows them they will be understood.	☐	☐	☐

Part 1 score (max 10) _____

PART 2

The phone

For most practices this is where Spanish-speaking patients are won or lost.

	CHECKPOINT	YES	PARTLY	NO
6	The Spanish option comes in the first few seconds of your phone menu, and it is said in Spanish. “For Spanish, press 2” said in English, after four other options, loses callers before they reach it.	☐	☐	☐
7	A Spanish speaker is available during every open hour, including lunch, sick days and vacations. If Spanish coverage is one person, it is not coverage. Write down who covers when that person is out.	☐	☐	☐
8	Spanish callers do not wait on hold longer than English callers. “Let me find someone who speaks Spanish” often means three minutes on hold. Measure it in the test calls.	☐	☐	☐

9	Missed calls and voicemails in Spanish get a call back the same business day, in Spanish. A patient who leaves a message and hears nothing by the next morning has usually called someone else.	☐	☐	☐
10	Your voicemail greeting is in both languages and says when the caller will hear back. See the sample greeting on page 8.	☐	☐	☐
11	After hours, Spanish callers get a Spanish option and clear emergency instructions in Spanish. Check what your answering service or after-hours message actually says.	☐	☐	☐
12	Your Spanish-speaking staff can explain insurance basics in Spanish. Copay, deductible, prior authorization, referral, out of network. Conversational Spanish is not the same as explaining a deductible.	☐	☐	☐
13	You track answered, missed and abandoned calls, and ideally which language the caller chose. Most phone systems can report this. If no one looks at it, nobody knows how many calls are lost.	☐	☐	☐

Part 2 score (max 16) _____

PART 3

Scheduling and reminders

Getting the patient booked is half the job. Getting them to show up is the other half.

CHECKPOINT	YES	PARTLY	NO
14 The patient's preferred language is recorded at the first call and used for every contact after it. If it is not in the scheduling or practice-management system, every later call and text starts in English by default.	☐	☐	☐
15 Appointment reminders (text, call or email) go out in the patient's language. Many reminder systems support Spanish but have it switched off. Check the settings, then send yourself a test.	☐	☐	☐
16 Pre-visit instructions exist in Spanish. What to bring, when to arrive, fasting, compression stockings, no makeup or jewelry before a procedure. Missing instructions lead to rescheduled procedures.	☐	☐	☐
17 Patients can cancel or reschedule in Spanish without waiting for a callback. If rescheduling in Spanish is hard, patients simply do not show up.	☐	☐	☐
18 No-show follow-up calls are made in Spanish, the same day. A friendly call the same afternoon rebooks many no-shows. A week later, most are gone.	☐	☐	☐

Part 3 score (max 10) _____

PART 4

Forms and paperwork

CHECKPOINT	YES	PARTLY	NO
19 Intake, medical-history and consent forms are available in Spanish, translated by a qualified translator. A free online translation of a consent form can say something different from the English. Have a person check it.	☐	☐	☐
20 Your privacy notice and financial policy are available in Spanish. Patients sign these before anything else. If they cannot read them, the first thing you ask of them is to sign something blind.	☐	☐	☐
21 Someone checks Spanish forms for missing answers while the patient is still there. A blank insurance field found after the visit becomes a denied claim and a call nobody wants to make.	☐	☐	☐
22 Patients get patient-portal sign-up instructions in Spanish. Many portals have a Spanish setting. Patients rarely find it on their own.	☐	☐	☐
Part 4 score (max 8) _____			

PART 5

In the office

CHECKPOINT	YES	PARTLY	NO
23 A sign at check-in says, in Spanish, that language help is available at no cost. Patients often do not ask for an interpreter because they assume they will have to pay or bring their own.	☐	☐	☐
24 Clinical conversations use a qualified interpreter or a bilingual clinician, not children or relatives. Family members leave things out, soften bad news or do not know the medical words. See the note on page 9.	☐	☐	☐
25 Check-in and check-out staff can greet patients, collect copays and book follow-ups in Spanish. The front desk is the first and last impression of every visit.	☐	☐	☐
26 Every staff member knows how to reach a phone or video interpreter, and can do it in a couple of minutes. Ask two people at random. If they have to look for the number, it will not get used.	☐	☐	☐
Part 5 score (max 8) _____			

PART 6

After the visit

CHECKPOINT	YES	PARTLY	NO
27 Statements and balance calls are available in Spanish. A bill a patient cannot read is a bill that waits. Balance calls in the patient's language get paid sooner.	☐	☐	☐
28 Payment plans and financing are explained in Spanish, in writing as well as out loud. Especially for cosmetic procedures. Patients who understand the terms are more likely to go ahead and to pay on time.	☐	☐	☐
29 Post-procedure instructions are in Spanish, and the patient knows who to call, in Spanish, with a question. A patient who cannot reach anyone after a procedure goes to urgent care, or posts a review.	☐	☐	☐
30 You ask Spanish-speaking patients about their experience, in Spanish. A two-question text or a short call. If your survey is English-only, you are not hearing from these patients at all.	☐	☐	☐

Part 6 score (max 8) _____

THE TEST

Five calls to make this week

Your own answers describe how things are supposed to work. These calls show how they actually work.

Ask a fluent Spanish speaker who does not work for you (a friend, a relative, a patient advisor) to call your main number five times at different times of day. Give them a simple reason to call. Do not tell the front desk.

#	When	The call
1	Monday or Tuesday, 9-10 AM	New patient. Asks, in Spanish, whether you take their insurance and when the first available appointment is.
2	12:30-1:30 PM	Same question, at lunch. This is when coverage most often breaks down.
3	The last half hour before closing	Asks to reschedule an appointment (made up) and asks what to bring.
4	After hours	Listens to the full after-hours message. Is there a Spanish option? Are the emergency instructions in Spanish?
5	Any time	Leaves a voicemail in Spanish with a name and number. Time how long the callback takes, and note which language it is in.

Record each call

What to note	Call 1	Call 2	Call 3	Call 4	Call 5
Answered by a person? (Y/N)					
Rings or seconds before a person answered					
Spanish offered in the first few seconds? (Y/N)					
Time until a Spanish speaker was on the line					
Question answered correctly? (Y/N)					
Appointment offered? (Y/N)					
Callback time (call 5)					
How the caller felt, one word					

After the calls, go back to Part 2 and re-score checkpoints 6 to 11. Do not blame the people who answered: if a call went badly, the cause is almost always coverage or process, not effort.

QUICK FIXES

Wording you can use today

Several checkpoints can be fixed in an afternoon with the right words. Adapt these to your practice, then have a fluent Spanish speaker read them aloud before you use them.

Phone greeting (checkpoint 6)

ENGLISH

Thank you for calling [Practice]. This is Ana. How can I help you?

ESPAÑOL

Gracias por llamar a [Consultorio]. Le habla Ana. ¿En qué le puedo ayudar?

In the phone menu, say “**Para español, oprima el 2**” in Spanish, right after the welcome and before any other option, so a Spanish speaker does not have to understand the English menu to find it.

Voicemail greeting (checkpoint 10)

ENGLISH

You’ve reached [Practice]. Our office is open Monday to Friday, 8 to 5. Please leave your name, date of birth and phone number, and we will call you back today. If this is a medical emergency, hang up and call 911.

ESPAÑOL

Ha llamado a [Consultorio]. Nuestra oficina está abierta de lunes a viernes, de 8 a 5. Por favor, deje su nombre, fecha de nacimiento y número de teléfono, y le devolveremos la llamada hoy mismo. Si se trata de una emergencia médica, cuelgue y llame al 911.

Appointment reminder text (checkpoint 15)

ENGLISH

Hi Maria, this is [Practice]. A reminder of your appointment on Tuesday, October 14 at 10:30 AM. Reply C to confirm or R to reschedule.

ESPAÑOL

Hola, María. Le escribimos de [Consultorio]. Le recordamos su cita el martes 14 de octubre a las 10:30 a. m. Responda C para confirmar o R para cambiar la cita.

Check-in sign (checkpoint 23)

ENGLISH

Do you need an interpreter? Let us know. It’s free.

ESPAÑOL

¿Necesita un intérprete? Díganos. Es gratis.

No-show call (checkpoint 18)

ENGLISH

Hi, this is Ana from [Practice]. We missed you at your appointment today and wanted to make sure everything is OK. I can find you a new time now if that helps.

ESPAÑOL

Hola, le habla Ana de [Consultorio]. No pudimos verle hoy en su cita y queríamos saber si todo está bien. Si le parece, le busco otra fecha ahora mismo.

YOUR RESULT

Score and three fixes

Part	Max	Your score
1. Before they call	10	
2. The phone	16	
3. Scheduling and reminders	10	
4. Forms and paperwork	8	
5. In the office	8	
6. After the visit	8	
Total	60	

Choose three fixes

Start with the part where you lost the most points, and within it, the checkpoint that touches the most patients. For most practices that is the phone. Give each fix one owner and one date.

#	Fix (checkpoint number and what will change)	Owner	Done by
1			
2			
3			

Repeat the five test calls about a month after the fixes are in place. That is the only way to know they held.

A NOTE ON THE RULES

Practices that take Medicaid or other federal health funds generally have language-access duties under Section 1557 of the Affordable Care Act. Those duties include offering qualified interpreters at no cost and limiting when family members, and especially children, may interpret. Some states and payers add their own requirements. This guide is not legal advice. Ask your counsel or compliance advisor which rules apply to your practice.

If the phones are the gap

For most practices that take this audit, the lost points sit in Part 2. There are not enough Spanish speakers on the phones, at enough hours, to answer every call.

XLA Health has English and Spanish speakers who answer the phones, run the front desk and handle admin and billing work remotely, during your hours and in your time zone. They are our own people, college-educated, and work with HIPAA-compliant processes. They are not an answering machine and not an AI phone system. Patients get a person who listens.

We work with vein, primary-care and plastic-surgery practices in New York. Our people cost a fraction of a local hire and less than an AI phone system, and the team can grow or shrink with your practice.

What we cover

- Patient calls, scheduling and appointment management
- Appointment reminders that reduce no-shows
- Back-office records and daily workflow
- Billing: claims, payment posting, denial follow-up, collections
- Answering service aligned with U.S. time zones

Try it for a month, free

One of our English and Spanish speakers on your phones for one month. No charge, no commitment. Nothing changes for your existing team.

Let us know and we'll set it up.

Talk to us

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