BRILLIANT MEDICAL SOLUTIONS

Voice AI in the Medical Practice

Every call answered, every hour of the day, and a front office that finally gets to breathe

By Keith Kravitz, Brilliant Medical Solutions

I have spent more than twenty years in the waiting rooms and back offices of medical practices. The front desk is where a practice wins or loses its patients, and it is also where the most work lands on the fewest people. The phone rings while a patient is checking in. A new patient calls at 7:40 at night. An insurance company needs one more form before a procedure can be scheduled.

This report shows how a Voice AI, working alongside a small team of supporting AI, takes on that work around the clock so your staff can give their full attention to the patients standing in front of them.

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1. The phone is your front door

Most new patients meet your practice for the first time on the phone. Existing patients call to book, move, confirm or ask a question. Every one of those calls is a patient who wants something from you right now.

When the call is answered quickly by someone who knows your schedule, the patient books. When the line is busy, goes to voicemail or rings after hours, many of those callers simply try the next practice on the list.

A Voice AI answers that front door every time it rings, day or night, weekends and holidays included.

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2. The lead role: a Voice AI receptionist, 24/7

Your Voice AI answers in your practice's name, in a warm and natural voice, and follows the same steps your best receptionist would:

- **Greets the caller and gets their name.**

- **Asks whether they are a new or existing patient**, so new patients get a welcome and existing patients get found in your system.
- **Learns the reason for the call**, starting general and getting specific.
- **Solves it on the spot**: books the visit, moves the appointment, answers the question from your approved answers, or takes a detailed message.
- **Hands the call to your team** whenever the patient asks for a person or the question is clinical, with the caller's name and reason already captured.

Every call is logged with a summary, so your staff starts the morning knowing exactly what happened overnight.

What a call sounds like at 8:15 on a Tuesday night:

Voice AI: Thank you for calling Lakeside Family Medicine, this is the after-hours line. Who do I have the pleasure of speaking with?

Maria: Hi, it's Maria Lopez.

Voice AI: Hi Maria. Are you an existing patient with us, or would this be your first visit?

Maria: I'm a patient. I need to see Dr. Patel about my blood pressure.

Voice AI: Of course. Dr. Patel has openings Thursday at 9:30 and Friday at 2:15. Which works better for you?

Maria: Thursday at 9:30.

Voice AI: You're all set for Thursday at 9:30 with Dr. Patel. I'll text you a confirmation now and a reminder the day before.

Practice and patient names are an example.

What the Voice AI handles around the clock

When	What the Voice AI handles
Early morning	Books the day's openings
Office hours	Answers when the desk is busy
Lunch	Covers the phones
Evening	Books visits
Overnight and weekends	Books and flags urgent calls

A Voice AI receptionist answers calls and books visits at every hour of the day and night.

3. Scheduling and appointment management

Scheduling is more than booking. Your Voice AI manages the whole life of an appointment:

- **Books new and returning patients** into the right visit type, provider and length, following your scheduling rules.
- **Reschedules and cancels** without a hold queue, then offers the open slot to patients on your waitlist.
- **Confirms every appointment** by call or text and records the answer.
- **Sends reminders** with the date, time, location and what to bring.
- **Follows up on missed appointments** the same day with an offer to rebook.
- **Calls patients due for recall**, such as annual physicals and chronic care follow-ups, and puts them on the schedule.

The result is a fuller schedule that your team did not have to chase, and patients who show up prepared.

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4. The preauthorization process

Prior authorization is some of the most time-consuming work in a medical office. Your Voice AI and its supporting AI move each request forward step by step:

- **Collects what the payer needs at the moment of scheduling**: insurance details, the ordering provider, and the service being requested.
- **Assembles the request packet** with the patient's information and the documentation your practice keeps on file, ready for your team to review.
- **Tracks every request by status** so your office manager sees what is pending, approved, or needs more information in one list.
- **Follows up on open requests** on a schedule, so nothing sits waiting.
- **Keeps the patient informed**, calling or texting when the authorization comes through and booking the visit in the same conversation.

Your team reviews and signs off on every submission. The AI does the gathering, organizing and follow-up that eat up the day.

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5. Better patient care, not just a lighter workload

Patients feel the difference first:

- **They reach your practice whenever they call**, including evenings and weekends.
- **They get answers in seconds** instead of waiting on hold.
- **They arrive prepared**, with reminders, directions and forms completed ahead of time.
- **They hear back on authorizations** without having to call and ask.
- **They get more of your staff's attention** in person, because the phones are handled.

Your team feels it too. The person at the front desk can look up and greet the patient in front of them instead of holding a hand over the phone.

6. The supporting team: Marketing, Sales and Operations

The Voice AI leads, and a team of supporting AI works behind it, all reading from the same record of your practice so every patient gets one consistent experience.

Marketing

- Asks happy patients for reviews right after a good visit.
- Reaches out to patients who have not been in for a while and invites them back.
- Keeps your website, social media and patient newsletter current with your services.

Sales

- Follows up on every new patient inquiry, from your website, phone or social media, while interest is high.
- Follows up on recommended treatments and procedures that were discussed but never scheduled.

Operations

- Sends intake forms before the visit and checks that they come back complete.
- Keeps patient contact records current.
- Delivers a daily summary to your office manager: calls handled, appointments booked, authorizations in progress, and anything that needs a person.

Who handles each task

Task	Who handles it
Calls 24/7	Voice AI
Scheduling and reminders	Voice AI
Prior authorization follow-up	AI, signed off by your team
Reviews and newsletters	Marketing AI
New inquiries	Sales AI
Intake forms	Operations AI

The Voice AI leads, and specialized AI handles tasks across marketing, sales, and operations.

7. How it fits your practice

- **Built for your practice.** Your greeting, your scheduling rules, your providers, your answers to common questions, in your practice's voice.
- **Connected to your systems.** It works with your practice management and scheduling software so appointments land where your team already looks.
- **Protected health information handled under a Business Associate Agreement**, with every call and message logged.
- **You stay in charge.** Everything starts with your approval, and you hand over more as the results earn your trust.

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8. How we get started

- **We map your calls.** On a 30-minute Intro Call we walk through how calls, scheduling and authorizations flow through your office today.
- **We build it and run it.** We set up the Voice AI and the supporting AI for your practice, and we operate it for you.
- **You approve, then you release.** Your team reviews the work at the start and hands over more as it proves itself.

See it for your practice

Book a 30-minute Intro Call and we will walk through your front office together and show you where a Voice AI would help first.

Book here: https://ai.optimizinggroup.com/widget/booking/VuDuA362tIC7u4hmiGmV

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