New Patient Follow-up Script Week 2 Summer 2020

- Script is a suggested flow and may vary by patient and patient responses.
- Start with a smile!
- Motivate, inform, and loop back to case manager if necessary

Voicemail (to set up on Help Desk phones)
Hello! You've reached the Help Desk with Lincoln Community Health Center. If this is a medical emergency, please hang up immediately and dial 911. If you are calling regarding an urgent matter related to your community resource referral, please contact your care team at Lincoln Community Health Center directly at (919) 956-4000. If you are calling to follow-up on a missed phone call, thank you for your call; we're sorry we missed you! Please leave a voicemail with your name and call-back number at the tone. We will return your call within a week and look forward to speaking soon.

First Voicemail (to leave on patient phones)
Hi, I'm calling from Lincoln Community Health Center. My name is _____, and I am a Community Resource Navigator. I just wanted to follow up with you about some resources you were referred to. I'll plan to call back some time within the week from this phone number! Sorry we didn't reach you this time. Thanks so much, bye.

Second Voicemail (to leave on patient phones)
Hi, I'm calling from Lincoln Community Health Center. My name is _____, and I am a Community Resource Navigator. I just wanted to follow up with you about some resources you were referred to. I'll plan to call back some time within the week from this phone number! But please feel free to leave me a voicemail or text with your name [pause] and availability [pause]. My number is (919) 886-5083. Again, I'm_____ at (919) 886-5083. Sorry we weren't able to reach you at this time. Thanks so much, bye.

Third Voicemail (to leave on patient phones)
Hi, I'm calling from Lincoln Community Health Center. My name is _____, and I am a Community Resource Navigator. I just wanted to follow up with you about some resources you were referred to. I'm sorry I haven't been able to reach you. Please feel free / You're still welcome to leave a voicemail or text with your name [pause] and availability [pause] at (919) 886-5083. Again, that's (919) 886-5083. Otherwise, feel free to reach me through Lincoln in the future! Thanks so much, bye.

Summer 2020 Script:

1. Hi, this is _____. Am I speaking with _____?

2. Hi, I'm volunteering with Lincoln Community Health Center. My role is to help patients work with community resources for things like [food, financial assistance, housing, etc]. I know you had a recent phone call check-in with a case manager from Lincoln [Candace/ D'Nicolole/ Diana/ Nekoba], and I'd like to follow-up on how things are going. I also want to be sure you have important information on the coronavirus. Is now a good time for a brief call?

3. Thank you for your time Ms./Mr._____! I'll start with a few questions. And of course, the information we discuss will be kept confidential.

   [Your case manager] told me that you were given some resources or information regarding [_____specific resource_____], [food], [employment resources], [managing stress]...

   [If 1 referral, SKIP]
4. Of your referrals, which one of these do you feel is the most important to you?
   [pending patient response]

5. Ok, let's talk about that one. Were you able to call or connect with _____?

   [If no]

   > **Was there a specific barrier or reason that kept you from connecting?**
   > *[record reason in RedCAP]*
   > **[If the patient references COVID19, use MI]**
   > **Yes, that makes a lot of sense. I'll be sure to share some important information with you about COVID19 before we finish.**
   > **I know this has been a difficult time for everyone. Social distancing or staying at home is a smart decision, but it's also good to make sure you're doing what you can to take care of yourself.**
   > **Are you still interested in connecting with [the service]?**
   > - *[if no]*
   >   *Ok, I completely understand. I respect those needs and your priorities during this time. (Use MI where appropriate)*
   >
   > - *[If yes]*
   > - **Ok, maybe we can work together to find a way to safely access this resource.**

→ *[In the information you give, provide up-to-date knowledge, assess the urgency and risk of accessing that resource.]*

[If application based]
[Provide initial information/description about the resource]
I would recommend that you send in your application either through the internet or by mail instead of in-person to minimize risk.
(can you remind me, did you CM help you complete the application, mail you the application to complete, or expect you to fill out the application on your own?
- If no assistance, potentially use more in my basket service for patients
- Can always go in person to the DSS
- *provide application website, phone number for mail-based applications*

[If appointment-based or typically in person]
Based on the circumstances, this resource is currently *(research CBO)*
- in full operation
- *- Please call ahead before arriving at in-person referrals to ensure the operation status has not changed.*
    - Ex: "The organization is currently asking people to call ahead before coming to their appointments to be informed of their new protocol for coming in. They want to know if you are experiencing any symptoms. Although they are in full operation, I would advise practicing every precaution to avoid public areas, stay at least 6 feet away from people, and to avoid touching frequently touched surfaces. Wash your hands frequently, and avoid touching your face."
- in altered operation
    - Ex: "The organization is now switching to online services"
    - Ex: "The organization is now making people remain in their cars to receive food from the foodbank"
    - Ex: "Because there are reduced workers, the organization has changed their hours"
- closed
    - unfortunately, we will have to navigate another way to access what you need. Let me look through our directory to see if there is maybe another resource you could use.

[If handout]
- *As question what they know first*
- *Ex: I know your CM might have referred you to some FA resources, did you receive an information in the mail or did you talk about this resource with you CM previously*
- Ex: "Luckily, this service is done over the phone, so you can proceed as usual, but their hours have changed"
- Ex: "If you refer to your handout, you can access the resource over the

internet"

Now, of your other referrals [list the other referrals], which one is the next most important?

Great. Before we end the call, I would like to provide some information about the coronavirus that the Lincoln team and I believe would be helpful for you. →COVID

Ease of Use
Thanks for sharing. It sounds like [__show that you were listening__].
I'm curious to learn how easy it was to use the resource. On a scale from 1-10, 10 being the easiest, how easy was it to use/access [the service]?
> *[if anything less than 10]*:
> i. I'm interested in your experience. What led you to score this a # = [highly/not] of being useful?
> ii. What would have made this experience a 10?

Utility
Thanks for sharing. I understand it was [validate previous response].Now I'm interested to see how useful it was. Once you actually got [the service], on a scale from 1-10, 10 being the most useful, how useful was the service?
> *[if anything less than 10]*:
> i. I'm interested in your experience. What led you to score this a # = [highly/not] of being useful?
> ii. What would have made this experience a 10?

Now, of your other referrals [list the other referrals], which one is the next most important?

*   *   *   *   *   *   *   *   *   *

[Transition to COVID19 Information]

6. **Thanks for your input. Next, our team at Lincoln really wants to make sure that all our patients have the most recent information about COVID-19. I would love to talk a little about that with you given there has been some misinformation going around. So have you been staying up to date about the current outbreak?**

   [pending patient response, show active listening Ex: It really is an unbelievable time.]

General tips for asking questions about knowledge

[If they are wrong about something, kindly correct them]
- ex:
- ex: Oh that's close, but the main ones are actually

[Segue into each topic, give plenty of positive affirmation when correct, delicately and kindly correct them if wrong]
- ex: Yes, that's great. Tell me more about… [insert question]
- ex: Ok, sounds good. Let's talk through…[insert question]
- ex: That's almost correct. Just one detail is that. Can you tell me other [continue prompting the question].

[Other transitions]
- I'm glad we talked about that. Maybe we can discuss [this] now.
- Besides "Ok, good" or "Ok, great" or "Sounds good" maybe "yeah, those are on the right track"

[Avoid]
- Repetition, "I understand", sometimes things are always "good" or "great", stay away from evaluative language like "that's correct"

7. **I'm curious to hear what you've learned about the coronavirus so far.**

   i. **I was wondering, if you or a loved one were to show any of the three main symptoms of COVID, which are fever, cough, and shortness of breath, do you have a plan on what you would do?**

      i. Call your doctor: ask what they advise and let them know you have symptoms.
      - Stay at home except to get medical care.
      - Continue to practice social distancing, but now within your home.

      [document in RedCAP which ones they get correct.]
      Yes, those are good options. The best practice that I would recommend if you or a loved one becomes ill is to call your doctor. While on the phone, ask what they advise and let them know you have symptoms. Lincoln has advised their patients

to call their main line at (919) 956 - 4000. Second, stay at home except to get medical care. Third, continue to practice social distancing. This means avoiding close contact with people at home and sharing personal items. Some additional information that you should know, if you have an appointment (either at Lincoln or somewhere else), it is important to call ahead before going and confirm their protocol. Finally, if you have a medical emergency, be sure to call 911.

ii.   **So, next I was wondering, what are the main steps you have been taking take to protect yourself and others against the spread of the coronavirus?**
- Practice the 3 Ws:
  - Wear: a mask while in public
  - Wait: at least 6 feet away while social distancing and stay at home
  - Wash: your hands and other surfaces frequently
    - after blowing your nose, coughing, or sneezing; going to the bathroom; and before eating or preparing food

- Don't touch your face: eyes, mouth, and nose
[document in RedCAP which ones they get correct. Fill in missing info]
Yes, I find it easiest to remember using the 3 Ws…
Optional: Also, there is a texting service from the state of North Carolina that will give you updates and important information. Would you be interesting in receiving text updates:
    [pending patient respond]
All you have to do is text COVIDNC in all caps to 898211 and they will send you information updates.

I'm glad we talked about that.

8. **Alright, do you have any other questions that I can help answer?**

9. **I know we discussed a few things just now. *[give a brief summary of call].* Does this sound correct to you?**

10. **Based on our conversation, where would you like to go from here, in terms of connecting with [service]?**
[Reflect response about next steps]

11. **Based on our routine follow up, I think it would be helpful for us to talk again in the next 2 weeks, just to see how things are going and check in on [_____]. Can I call you back again in 2 weeks around this time?**

12. **Thank you so much for your time today Mr./Ms. _____. I look forward to following back with you in the coming 2 weeks. Have a nice day! Good-bye!**