New Patient Follow-up Script Week 4 Summer 2020

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

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 on our call about 2 weeks ago. I'll plan to call back some time within the week from this phone number! Sorry I 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 on our call about 2 weeks ago related to community 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 I didn't reach you but I'd love to hear from you. 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'm just wanted to follow up with you on our call about 2 weeks ago related to community resources you were referred to. I'm sorry I haven't been able to reach you. 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.

Modified Voicemail (if did not reach on week 2)
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 on resources you were referred to. Sorry I still haven't been able to reach you! I'll plan to call back some time within the week from this phone number! Thanks so much, bye.

Summer 2020 Script:

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

2. Hi, it's nice to speak with you again. I'm calling from Lincoln Community Health Center and wanted to follow-up on our [chat or voicemail] we had about 2 weeks ago related to [free medication program, food stamps, etc.]. I'm curious to learn more about how things went for you and would love to follow-up. 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.

[If 1 referral, SKIP]
Last time we talked about [housing and transportation, etc], and you mentioned _____ was most important. I believe we discussed _____ as your next steps. I'd love to hear more about how that went for you!
> *[pending patient response]*
Were you able to visit or connect with_____? Have you tried _____?

> *[if patient responds no]*
> Are you still interested in connecting with [the service]? I recall last time you mentioned _____.

> > *[if yes interested, see prompts below]*
> > Were there any reasons you weren't able to connect with [the service]?
> > <u>OR</u> Is there anything we can do together that can assist your efforts?
> > <u>OR</u> What would you like to get out of an agency referral?
> >
> > → How do you usually [find solutions to this barrier]? (ie find transportation)
> > → Can you give me a minute or so to look up that information for you? /
> > > Is it ok if I call you back in a few minutes to pull up [this information] for you?
> > > - Do you have a pen and paper available?
> > > - Would you want to read back the phone number to me to double-check?

> > *[if not interested, see prompts below]*
> > Was there anything that made you interested in the initial referral? I'm wondering if anything changed for you that made you change your mind about [the resource].

➔ I know that the care team at Lincoln thought you would benefit from [this service.]
➔ Is there anything you'd be willing to do about _____?
➔ Is there anything you imagine that might change your mind?
➔ Do you think there's a reason in the future that might   change your mind?
➔ We understand. If you ever change your mind, feel free to connect with us via Lincoln. We're always open to listening and working together with folks on their health-related goals.

[if patient responds with yes, was able to visit/connect with service; collect Ease of Use/Utility]

Ease of Use
Thanks for sharing. What I'm hearing is you were able to get [_____]. On a scale from 1-10, 10 being the easiest, how easy was it to use/access [the service]?
(easiest to access)   10   9   8   7   6   5   4   3   2   1

[if anything less than 10]:

i. I'm interested in your experience. What led you to score this a # = [highly/not] of being easy to access?
ii. What would have made this experience a 10?

Utility
Thanks for sharing. So glad you were able to connect I understand it was [validate previous response]. Once you actually got [the service], on a scale from 1-10, 10 being the most useful, how useful was the service?
(most useful)   10   9   8   7   6   5   4   3   2   1

[if anything less than 10]:
ii. 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?

[for multiple referrals]:
5. I know you were also referred to but didn't connect with [_____], [_____] the last time we talked. I just wanted to be able to share with our team at Lincoln, since then, were you be able to connect with any of [these additional services]?

[if patient responds with yes]
[return to Ease of Use and Utility Questions]

i. We want to be most helpful to you, do you still want to talk about [these other services]?
ii. Is that something I can assist you with?

6. I'm glad we talked about that. Do you have any questions about [any of your resources]?

7. *[if you reached patient at week 2]*
Last time we talked about the current coronavirus outbreak and you were able to answer some questions about it for me. I just want to remind you again to continue practicing the 3 Ws of "Wear" a mask when out in public, "Wait" at least 6 feet away from others, and "Wash" your hands and frequently touched surfaces on a regular basis. Finally, be sure to call your doctor if you experience coronavirus symptoms. How do you feel about all of this? Do you feel comfortable about taking these steps?

7. I know we discussed a couple things just now. [This is what I've learned]…do you have any questions about your resources, the coronavirus, or anything else I can help you with?

8. Based off our conversation, where would you like to go from here regarding connecting to resources?

9. <Reflect response about next steps> Based on our routine follow up, we currently don't have any other follow-ups scheduled. However, you're always welcome to reach our team by calling the Lincoln main line and speaking with Behavioral Health.

11. Thank you so much for your time today Mr./Ms. _____. It was wonderful getting to speak with you. Have a nice day! Good-bye!