

Sample Phone Script to Schedule Home Visit

Once you discover pt. has been discharged, call the patient to set up a time for home visit. Below is a sample script for this first phone interaction:

Hi, my name is _____. I am the person who met you while you were in the [hospital/SNF/other: provide name of facility]. I gave you a [green] book, the one to help you develop your own personal health record. As I mentioned when we first met, I will be coming to your home to help you in your recovery, to go through your medications, to go over any questions you may have and to get you ready for the follow-up appointment with your doctor. This visit will last less than an hour. I'd like to set up a time for the home visit that's convenient for you and any family members who help you with your care. What would be a good time for us to meet for a home visit? It would be helpful if you can take a few minutes before we come to gather up all your medications, any medications lists you have, and the discharge summary from the hospital. Great—I'll see you in [date/time].

Sample Script: Introducing yourself at the home visit

Hi, I'm _____. I'm here to help you in recovery and get all of your questions answered. We can also review your medications and prepare you for your doctor's visit.

Is there somewhere we can sit where we can put things like your medications out on a table?

This will be a different kind of visit from others you may have had, such as with a visiting nurse or physical therapist. I'm here to help you make sure that your needs are met. In particular, we will go over how you can be better prepared to meet with your doctors and specialists and help you better understand your medications. This is the only time we will meet in person, but I'll be calling you a few more times to check up and see how you are doing.

Do you have that [green] book I gave you? Let's start there....[use the PHR as a guide through the four pillars]

I'd like for us to review your medications now. Could you gather all your medications and bring them to the table so we can go over them together? [*the patient should be doing the gathering; not the coach*]

Let's see what you're taking: can you tell me what you are taking and how you take it?

Sample Recap (end of home visit)

So we've gone over a lot of things today. Let's review the most important things we've touched on, including your questions and things that need to be done. First, you've written several questions in your personal health record. What are the top three questions you'd like to get answered? Remember to take this booklet with you when you go to see your doctor and update it with any changes the two of you may make. What other things need to be done before my next call [schedule f/u visit, get prescriptions filled, pick up testing supplies, arrange for visiting nurse, etc.]? I'm going to call you [later this afternoon, tomorrow, in a few days, next week] to follow up and see how things are going and if you got your questions answered. Do you have any other questions before I go? On the back of your personal health record is my name and number. If you hit a roadblock, please call me. I'm available [schedule].

- Introduction: introduce the idea that we'll be reviewing today's visit
- Review patient questions: Top three questions, reminder to take PHR to visit/s.
- Other tasks: Other important tasks and timelines
- Next interaction: let them know when to expect next coach contact
- Questions : Any last questions and info. On how/when they can reach you