

Proactive Patient Outreach

During the COVID-19 Public Health Emergency

As your practice continues to conduct telehealth visits and expands operations to include more in-person visits, it is important to ensure patients are aware of how to best access care. This guide contains a call script for phone outreach, as well as recommendations for other outreach methods like text/SMS messages, email blasts, or patient portal messages.

Telephone Outreach

You can use telephone outreach to contact patients to inform them about options to access care at your practice, gaps in their recommended preventive or chronic care, information on telehealth visits, and more. Before you plan which patient groups to call, it may be helpful to conduct risk stratification; this process helps to identify higher-risk patients who should be encouraged to use telehealth. Below is a list of patient groups to consider for telephone outreach:

- Patients with scheduled in-person visits that can be converted to telehealth visits
- Patients at highest risk for severe illness from COVID-19 (see [NYC REACH COVID-19 Risk Stratification Report](#)) – these patients may also have other chronic care gaps that you can address
- Patients not seen recently, who need to be re-engaged in care
- Patients on chronic medications who may soon need refills
- Other groups you may think will benefit from proactive outreach at this time

Call Script

If you are able to get the patient on the phone, use the full script. If someone else answers the phone and the patient is not available, ask for a good time to call back. If you get a voicemail, proceed to voicemail script below. **Highlights** indicate that you should modify wording to match your practice's information.

1. **Introduction:** Hello, this is [your name] from [practice name or Dr. Smith's Office]. Dr. Smith asked me to call because *(based on which population you are calling, use one of the reasons below)*:
 - **Converting in-person to telehealth:** You have an appointment scheduled for MM/DD in our office. Dr. Smith is now offering telehealth visits. I can give you some information about telehealth, and you can decide if you would prefer to see the doctor through telehealth.
 - **High-Risk or Chronic Care:** We would like to schedule a visit for your [condition]– it is important to check in with the doctor. We can schedule a telehealth visit so you would not need to come to our office. I can tell you more about how that works.
 - **Not seen recently:** We have not seen you recently. I want to share our current hours with you and tell you about our telehealth program.
 - **Refill:** Based on your last appointment and refill dates, it looks like you may need more refills of your [Medication] soon. You can speak with the doctor without coming into the office, or receive a refill through our telehealth program, I can explain more.
 - **Other:** We would like to talk to you about staying safe during the COVID-19 state of emergency, and to provide you with some information about how to get in touch with us during this time.
2. **Telehealth Information:** To make sure our patients can practice social distancing; we recommend having a telehealth visit. Telehealth means you will see the doctor without coming in. You can have the visit while you are at home or at work. We do this through video using your smartphone or computer. If you do not have a smartphone or computer, we can talk on any phone, and do not need video. We can do most things that we

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would do at an in-person visit such as refill medications, make referrals, discuss your concerns or symptoms, and more.

3. **Ask to schedule telehealth:** Would you like to schedule a telehealth visit, either using video through your smartphone or a call over the phone?
 - If yes, schedule and provide expectations on how to access the telehealth visit, or when to expect a phone call; confirm phone number/email/etc.; if using video, confirm they have smartphone or computer and ask if they are comfortable using it.
 - If no, ask if they would like to schedule an in-person visit. Also, share this information below in ‘Closing Information’ so they are aware.
4. **Closing Information:** Lastly, I want to tell you about our hours, and our plan for keeping patients safe:
 - Currently, we are open: **[list days and hours here]** and we see patients for both telehealth and in-person visits
 - If you are feeling sick, please call first, so we can determine if you need to come in-person
 - If you do not feel sick, but prefer an in-person visit, we can see you in-person. We are working hard to ensure patient health and safety and maintain social distance measures. We may ask you to come in-person after a telehealth visit, if we need to draw blood or do a physical exam.
 - Thank you for your time. If you have any additional questions, don’t hesitate to call us at **XXX-XXX-XXXX** or reach out through your patient portal. Stay safe and take care.

Voicemail Script

Hello, this is **[your name]** from **[practice name or Dr. Smith’s Office]**. Dr. **Smith** asked me to call to let you know we are open to see you for urgent needs as well as to continue to manage any chronic conditions. We are doing telehealth visits, which means you can see or speak to the doctor from your phone, without having to come to the office. The office is also open for in-person visits. Please call us back at **XXX-XXX-XXXX** to schedule an appointment.

Best Practices for Other Patient Outreach Methods

Alternatives to telephone outreach include email message blasts, text/SMS messages, patient portal messages, or social media posts. These are efficient ways to reach a large number of patients at once. Telephone outreach is best for patients with the highest need, but other methods are helpful to reach part or all of your patient population. When using these practices, it is important to keep the message simple.

Text

Many practices report their patients prefer text/SMS messaging. Below are some best practices in texting important information to patients:

- Texts are limited to 160 characters. Try to limit messages to fewer than 160 characters. Avoid sending long messages that will split into multiple texts.
- Choose your key message carefully. Adding too much other information may make the message difficult to understand. If your key message is “we are open and have telehealth” it might not make sense to also provide COVID-19 information or appointment details. If your message is “please wear a mask for your visit” it might not be helpful to also include information on inhalers.
- Be sure to identify yourself: “...From Dr. Smith” or “Queens Med Office”
- Do a small test to yourself or your staff before sending widely

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Email/Patient Portal

Email is also a popular outreach tool. Email and patient portal messages allow for more information to be shared than text/SMS and requires diligent collection of patient email addresses and/or activating patients to your portal. Important messages to share in your patient email campaign may include:

- *Hours you are currently open:* days, hours, times of day in which you only do telehealth, times of day reserved for sick call, etc.
- *Description of telehealth services:* what platform the doctor uses, how telehealth video and telephonic encounters work, links to download telehealth applications for smartphones.
- *COVID-19 information:* symptoms, what patients should do if they have been exposed, social distancing best practices and recommendations.
- *How to reach you:* even if you feel patients are already aware, it is important to reiterate ways you can be reached via phone, email, website, or patient portal.
- *How to make an appointment:* for both in-person and telehealth visits.
- *Steps the practice is taking to keep patients safe:* minimizing waiting room time, pre-screening all visits for COVID-19 symptoms, etc.
- *New policies for appointments due to COVID-19:* for example, all sick patients must have a telehealth visit before their in-person appointment.
- *A personal touch:* sign the email or message as the patient's primary care provider (e.g. "Be Well, Dr. Smith").