

Process for Inbound/Outbound Calls

March 23, 2020

Intermountain has updated recommendations for ambulatory care, please use the following scripting for outbound and inbound calls to help manage patient appointments.

Note: Every clinic* will need physicians, APPs and/or RNs to **review the upcoming appointment schedule(s) and categorize patients** into one of three categories (A, B, or C) to A) confirm appointment, B) offer alternative options, or C) reschedule for care.

*Imaging and Laboratory Services will postpone non-urgent diagnostic testing effective March 23, 2020. This is consistent with our decision to postpone elective surgeries and non-urgent ambulatory care visits. If a patient insists that they receive diagnostic testing, we'll provide the service, emphasizing the extra precautions we're taking to deliver safe care to all patients.

Outbound Calls

A. For patients that need to be seen in person

Hi, this is [Name] calling from [Provider's Name]'s office regarding your appointment. Is [Patient's Name] (or their parent/guardian) available?

(Verify speaking with the patient/parent/guardian)

Your upcoming appointment is scheduled for [date/time]. [Provider's Name] still feels it is important to see you in person. We are taking steps to help ensure your health and safety while receiving care in our office. We have a few instructions for you that support social distancing:

- *If possible, please come alone to your appointment.*
- *If not possible, you may bring one healthy adult who doesn't have a cough or fever. We ask that you please leave your children at home (if the child is not the patient).*

Do you have any other questions about your appointment?

(If patient has questions about COVID-19)

*We understand that many people in our community have concerns about COVID-19, the novel coronavirus. For more information, you can visit the website **CDC.gov/coronavirus**, or visit **IntermountainHealthcare.org** and select the coronavirus link. You can also call the COVID Hotline to speak to a healthcare professional available 24/7 to answer your questions.*

*The number is **844-442-5224**.*

(Patient wants more information about current visitor guidelines)

Our new visitation policies are based on guidelines from the CDC [Centers for Disease Control and Prevention] and the Utah Department of Health. The policies went into effect on Tuesday, March 17, and apply to all visitors or companions of patients.

- **All facilities:**
 - We are unable to allow anyone with confirmed or possible COVID-19 to enter our facilities unless they are seeking care.
 - Every individual must wash their hands or use alcohol sanitizer before and after leaving our facilities and rooms.
- **Hospitals:** We are not currently allowing visitors for our hospitalized patients except in special, unique circumstances.
- **Clinics:** We are allowing clinic patients to be joined by one adult (over age 18), please do not bring children. All companions should be healthy and without signs of respiratory illness unless they are seeking care.

B. For patient appointments that could be moved to virtual/phone visit

Hi, this is [Name] calling from [Provider's Name]'s office regarding your appointment. Is [Patient's Name] [or their parent/guardian] available?

(Verify speaking with the patient/parent/guardian)

[Provider's Name] feels it is important to hold your upcoming appointment scheduled for [date/time]. To ensure your health and safety, [Provider's Name] has determined that it can be done by a [video** or phone visit] as an alternative to coming into the office at this time. Would this option work for you?

- To schedule a video visit: Refer to [Scheduled Video Visit and Alternative Video Visit instructions](#) if needed.
- To schedule a phone visit: Document the preferred phone number for the patient in the first line of the scheduling comment.

C. For patient appointments that can safely be postponed

Hi, this is [Name] calling from [Provider's Name]'s office regarding your appointment. Is [Patient's Name] [or their parent/guardian] available?

(Verify speaking with the patient/parent/guardian)

[Provider's Name] asked me to call you about your upcoming appointment scheduled for [date/time].

To ensure your health and safety, [Provider's Name] has determined that your appointment can be rescheduled for a future date unless your condition has changed. Do you have a new health concern?

(If No, and patient wants to reschedule)

We are currently scheduling appointments for 6 – 8 weeks from now. Is there a day of the week that works better that I can schedule for you?

(If Yes, or patient wants to cancel appointment)

Let me share your concerns with [Provider's Name] and call you back, if he/she determines that a phone or video visit is an option, would that interest you?

(Patient wants to be seen for existing scheduled visit)

I understand that you would like to keep your scheduled appointment. I will let [Provider's Name] know. They may recommend a phone or video visit. Would this interest you?

(Patient pushes back, and wants to be seen in person)

I'll let [Provider's Name] know you would still like to keep your upcoming appointment scheduled for [date/time] in person. We are taking steps to help ensure your health and safety while receiving care in our office. We have a few instructions for you that support social distancing:

- *If possible, please come alone to your appointment.*
- *If not possible, you may bring one healthy adult who doesn't have a cough or fever. We ask that you please leave your children at home (if the child is not the patient).*

Do you have any other questions about your appointment?

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Inbound Calls with Scheduled Appointment

Thank you for calling Intermountain [Name of Location] office, this is [Name]. How can I help you?

*(Existing patient has a **scheduled appointment** and is concerned if it's still safe to be seen)*

A. For patients that need to be seen in person

[Provider's Name] still feels it is important to see you in person. We are taking steps to help ensure your health and safety while receiving care in our office. We have a few instructions for you that support social distancing:

CONFIDENTIAL: This material is prepared pursuant to Utah Code §26-25-1 et seq., U.R.C.P. 26(b)(1), and/or Idaho Code §39-1392 et seq., for the evaluation and improvement of health care rendered by hospitals, health care facilities, or health care providers. This document is not intended for distribution. Please do not copy or send electronically. Information can be shared as needed to assess risk and for clinical improvement.

- *If possible, please come alone to your appointment.*
- *If not possible, you may bring one healthy adult who doesn't have a cough or fever. We ask that you please leave your children at home (if the child is not the patient).*

Do you have any other questions about your appointment?

B. For patient appointments that could be accomplished with virtual video/phone visit

*[Provider's Name] feels it is important to hold your upcoming appointment scheduled for [date/time]. To ensure your health and safety, [Provider's Name] has determined that it can be done by a [video** or phone visit] as an alternative to coming into the office at this time. Would this option work for you?*

- *To schedule a video visit: Refer to Scheduled Video Visit and Alternative Video Visit instructions if needed.*
- *To schedule a phone visit: Document the preferred phone number for the patient in the first line of the scheduling comment.*

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(If No, and patient wants to reschedule)

We are currently scheduling appointments for 6 – 8 weeks from now. Is there a day of the week that works better that I can schedule for you?

(If Yes, or patient wants to cancel appointment)

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(Patient wants to be seen for existing scheduled visit)

I understand that you would like to keep your scheduled appointment. I will let [Provider's Name] know. They may recommend a phone or video visit. Would this interest you?

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D. For patient wishing to cancel appointment

I understand you may wish to cancel your appointment for safety reasons. Let me review your appointment with [Provider's Name] to see if a [video** or phone visit] is an alternative to coming into the office at this time, or if we can reschedule for a later date. Would that work for you?

(If patient insists on cancelling the appointment and does not want phone/video/reschedule option)

To alleviate your concerns, we do have some additional options that may meet your needs, or you can call us back if you change your mind.

- Have you tried Intermountain Connect Care? (Use [IntermountainConnectCare.org](https://www.intermountainconnectcare.org) or download the app)
- Would you like the phone number to Healthy Answers? (844-442-5224)