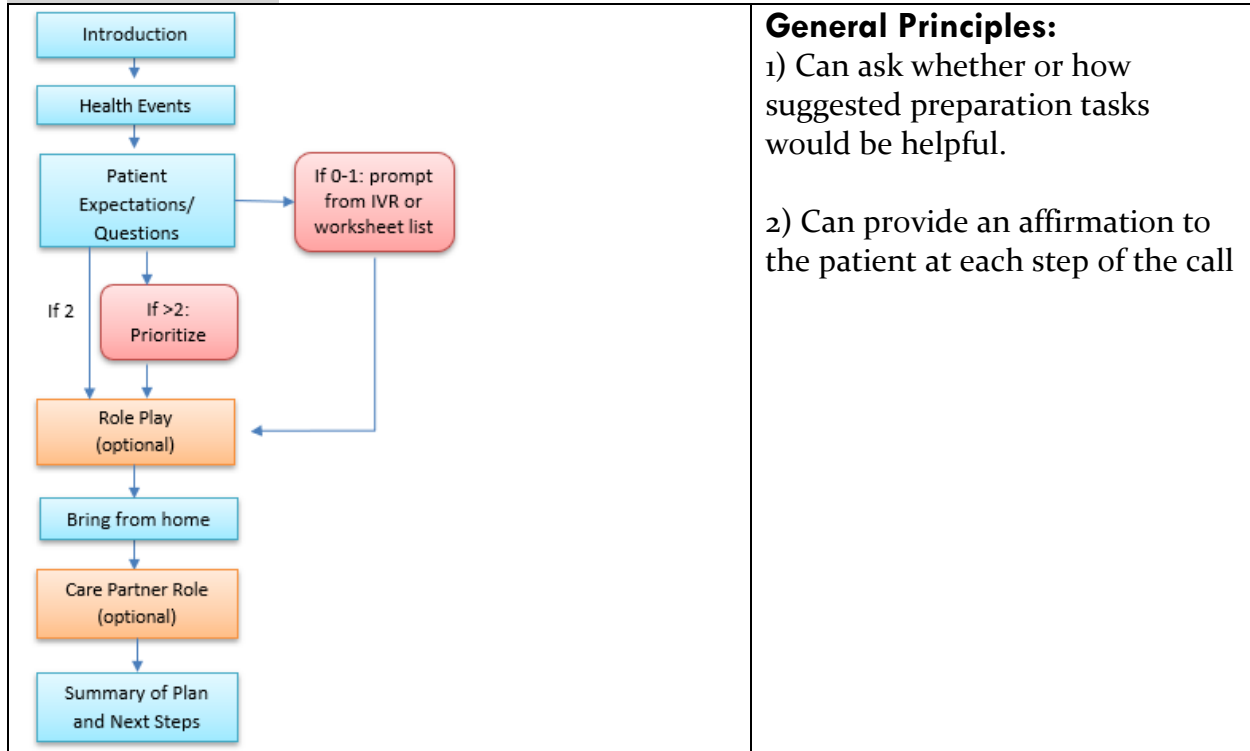


CO-IMPACT Visit Preparation Call Script

OVERVIEW OF CALL



Call the patient

- Be prepared to conduct the visit prep call when you call, in case the patient is free at the time
- Offer to either schedule a time or complete the visit prep call then
- The Care Partner does not need to be on the call but is welcome to join if the patient wants them on the call

INTRODUCTION

Suggested Script	Notes to coach
Hi, this is [coach's name] from [affiliation]. You have a primary care appointment coming up, and I'm calling to help you complete some brief preparation to help you get the most out of your visit.	
These calls usually last about 15 minutes. Is now a good time for us to talk?	<i>If not a good time, schedule a time to talk.</i>



If your Care Partner [name] is there with you now and you'd like them to join the call on another line or on speakerphone, please get them now.	
Before we begin, do you have a Diabetes visit planning worksheet and a pen or pencil available?	<i>Wait for them to retrieve it if necessary. If they are unable, suggest they get a blank piece of paper or notebook.</i>
We'll be using this worksheet to write down important things throughout this call. First, if you find it helpful, write down the date, time, and provider name for the appointment. Your appointment with [provider name] is scheduled for [date, time].	
During this call, we'll make a list of topics you'd like to bring up with the doctor/nurse at your appointment.	

RECENT HEALTH EVENTS

First, have there been any important changes in your health or health events since your last appointment that you'd like to update the doctor/nurse about? This could be a time you had to go to the emergency room, got sick at home, or visited a doctor outside your provider's health system. All of these types of events are worth telling your provider about -- and bringing in information about it -- even if you think they already have it.	<p>➤ <i>[affirmation opportunity: affirm them taking care of their health, tracking it, keeping documentation, etc.]</i></p> <p>➤ <i>Prompt them to write any events on their worksheet</i></p>
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PATIENT EXPECTATIONS / QUESTIONS

<p>[Besides telling your doctor about X event] What do you hope to get out of this appointment?</p> <p>[If nothing] For example, do you have any questions or issues you'd like to bring up, or things you'd like to get done while you're there?</p> <p><u>If Care Partner is on the call:</u> After asking patient, ask CP if anything from the recent automated call summaries stuck out to them</p> <p>→ Do you have this written down on your sheet of paper? It can help to write this down in advance. That way you won't forget it in the rush of the moment, and only remember it later, after the appointment. I am going to give you time to write down each issue you would like addressed, and you can use this as a checklist so you</p>	<p>➤ <i>Examples could be if they need prescriptions, referrals for different services, their A1c in writing, or if they just want the doctor to notice their success and get excited for them.</i></p> <p><i>[affirmation opportunity: affirm thoughtfulness, coming up with ideas, knowledge, etc.]</i></p>
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<p>know that you have covered everything that is most important to you.</p>	
<p><i>If they have 0-1 questions or concerns, → Go to IVR prompt or Generic prompt</i></p> <p><i>If they have 2 questions, →Go to role playing (optional) or bringing information from home sections</i></p> <p><i>If they have more than 2 questions, prompt them to write them down → Go to If more than 2.</i></p>	
<p>IVR Prompt (Optional: only if 0 or 1 item so far): During your last few automated CO-IMPACT calls, did you identify any health problems that you felt were important to work on?</p> <p>Would it be helpful to discuss these with your doctor or nurse?</p>	<p><i>Can prompt with IVR issues identified (most recent, or reoccurring issues) if they don't mention them.</i></p> <p><i>If none that they or IVR have identified use generic prompt</i></p>
<p>Generic prompt (optional: only if 0 or 1 issue so far): Here are some example topics you might have questions or concerns about. Do you have any questions or concerns about these things you'd like to ask your doctor?</p> <p><u>Topics (listed on worksheet):</u></p> <ul style="list-style-type: none"> • New or bothersome symptoms • How to use medicines • Medication side effects • High or low sugars • Blood pressure control • Healthy eating • Physical activity • Preventing new medical problems • Getting things done at the VA • Referrals for tests or specialists 	<p><i>Ask, "Do you have any questions for your doctor/nurse about..."</i> <i>Do not ask "Are you having problems with these things?"</i></p> <p><i>This could be a good opportunity for to share positive feedback on patients using strategies we've taught them (action planning, talking to CP more, being proactive about calling PACT)</i></p>
<p><u>Prompt for more than 2 issues (optional)</u> Which <u>one or two</u> of these issues you listed so far are most important to you to discuss during this visit?...</p> <p>Great, let's put a star in front of those. Those are the issues you can make sure to ask first thing. Then if there</p>	<p><i>Note to coach:</i> <i>Some things are quick (e.g. need a medication refilled) and others are complicated (e.g. need to figure out what a new symptom is from).</i></p>



is more time, you can ask about the other questions, or ask for a follow-up visit or call to talk about the others.	<i>They should be able to address the ‘quick’ things on top of the 1-2 important questions.</i>
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ROLE PLAY For highest priority or difficult question (optional):

Many people find that once they are in the doctor/nurse’s office, they have a hard time bringing up their question, or they don’t ask their question the way they meant to. Has that ever happened to you? What was that like / what seemed to make it difficult?	<p><i>If they bring up “barriers,” can give them tips from the barriers info.</i></p> <p><i>You could provide empathy and compassion. Must gain deeper understanding to do this genuinely. Could use as catalyst for role-play</i></p>
It may seem silly, but if you try saying your question out loud beforehand, it will be much easier for it to roll off your tongue when you’re in front of the doctor. -OR- If it’s OK with you, let’s take advantage of the moment and let me hear how you’d bring it up—just try it out	<i>Role playing is optional – if they don’t want to do this that’s ok. Consider encouraging them to practice with their CP.</i>
Let’s try it with one question. Pretend I’m the doctor/nurse/pharmacist. How will you ask me about xx?	<p><i>The most important thing here is that the patient practices saying the question like they’re asking the doctor. If possible, prompt on issue that seems most important and/or complicated.</i></p> <p><i>If having difficulty wording questions can use some of the “feedback” tips</i></p>
Great! I really liked how you... Do you want to write down that question using the same words you just used with me?	<p><i>Your feedback is more powerful when you specify what is great about it</i></p> <p><i>[affirmation opportunity: affirm that they are taking the time to write down.]</i></p>



INFORMATION PATIENT WILL BRING FROM HOME

<p>Now let's think about what information from home to bring with you to your appointment.</p> <p>We strongly recommend you bring this worksheet/list of things you want to discuss with your doctor/nurse.</p> <p>At the bottom of your <i>Visit Planning Worksheet</i>, there's a short list of other things you may want to bring:</p> <ul style="list-style-type: none">• Blood sugar log or glucometer with memory of readings• Blood pressure log• Medication list or log• Notes or results from non-VA medical visits• After visit summary from last appointment• Is there anything else that would be helpful for you to bring for the doctor/nurse to see? <p>What can you do to make it easy to remember to bring this list and these other items with you?</p>	
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CARE PARTNER ROLE: (optional, if time permits)

<p>Before we wrap up the call, I want to ask, is your Care Partner planning to accompany you to this medical visit?</p> <p>Some patients choose to include their CP in their visit and some do not. If you would like your CP to come along and they are able to, they may help you feel more confident communicating with your doctor, and help you remember what your doctor said.</p>	
<p>➤ IF YES:</p> <p>What would be helpful for your Care Partner to do during this upcoming visit?</p> <p><i>Prompts:</i></p> <ul style="list-style-type: none">• Listen to what the doctor says.• Take notes (for example, about your diagnosis, medications, diet, or referrals)• Remind me to ask my questions.• Ask the doctor questions directly, on my behalf.• Remind me to tell the doctor about my symptoms.	<p><i>Ask <u>patient</u>, not Care Partner</i></p> <p><i>Affirm when possible</i></p>



<ul style="list-style-type: none"> • Provide information about my health to the doctor. • Make sure I understand what the doctor says. • Stay in the waiting room for part of the visit. 	
<p>➤ IF NO: Many patients find it helpful to ask their Care Partner if any other questions or issues seem missing from their list. Care Partners can also help encourage you to ask your important questions.</p>	

SUMMARY OF PLAN AND NEXT STEPS

<p>So, to sum up what we've discussed so far, you plan to address X and Y; and bring X, Y, and Z with you [and you will remember the things you want to bring by doing X] .</p> <p>We recommend that you ask your questions at the beginning of the appointment to make sure the doctor has time for them.</p>	
<p>It is important for you to know that I am <u>not</u> going to share the questions and information we discussed today with your primary care team myself. The best way to make sure you get the information you are looking for is to bring these topics up during your appointment</p> <p>We recommend leaving this worksheet out where you will see it when you're getting ready to leave for your appointment. Then the day of your appointment, check that you have all the information you'd like to bring with you.</p> <p>I hope that this call will help you get the most out of your appointment. Thank you for taking the time to talk with me.</p> <p>I will be calling you again the next time you have a scheduled appointment with your primary care doctor, nurse, or pharmacist.</p> <p>Before we say goodbye, do you have any questions for me? Great. Again, thank you, and goodbye.</p>	<p>alternate: this may be the last time I call you before an appointment, but I encourage you to use the visit prep worksheets on your own before your appointments in the future.</p>

