

United Healthcare Medicare Advantage Case Management Plan  
Telephone Call Template & Script

- DIAGNOSIS:
- REASON FOR CALL: Follow up assessment and education
- QUESTIONS RELATED TO DISEASE PROCESS/MEDICATIONS/PRIOR INSTRUCTION:
- CONDITION ASSESSMENT &CHANGES
  - PAIN
  - CARDIOVASCULAR:
  - RESPIRATORY
  - BOWELS
  - URINATION:
  - FEVER:
  - FALLS SINCE THE LAST VISIT?
  - MEDICATIONS
  - NEXT MD APPOINTMENT?
- EDUCATION PROVIDED BASED ON QUESTIONS OR SYMPTOMS:
  - Patient educated to call SN on call number for symptom changes or concerns and when to call 911.
- COMMUNICATION:
- PLAN FOR NEXT VISIT/TC:

United Healthcare Medicare Advantage Case Management Plan  
Telephone Call Template & Script

Script: 1<sup>st</sup> week

Hello (patient name).

**REASON FOR CALL:** I know you were discharged from the hospital this week and we've started your home health visits. But the first week can be a little difficult and I just wanted to call and see how you are doing. I know we gave you a lot of information during your first week at home and you probably have some questions. I'd like to ask you a few questions about how you are feeling, but first I'd like to know if you have any questions since your last home visit.

**PATIENT QUESTIONS:** What questions do you have?

**CONDITION ASSESSMENT & CHANGES:** Now I'd like to ask you some questions about your (disease/diseases). Have you had any changes or new symptoms since your last visit?

- ARE YOU HAVING ANY PAIN?
  - If yes - is this new or changed? Describe location, amount on a scale of 1-10, what relieves pain, pain scale when relieved
- ANY CHANGES WITH YOUR HEART? Pain/swelling in feet or legs/dizziness etc.
- ANY CHANGES WITH YOUR BREATHING? SOB/cough/wheezing etc.
- ANY CHANGES WITH YOUR BOWELS/URINATION? Constipation, diarrhea, pain, etc.
- ANY FEVER?
- HAVE YOU HAD ANY FALLS SINCE THE LAST VISIT?
- ARE YOU TAKING ALL OF YOUR MEDICATIONS AS PRESCRIBED?
- HAVE ANY OF YOUR MEDICATIONS BEEN CHANGED?
- WHEN IS YOUR NEXT MD APPOINTMENT?
- EDUCATION PROVIDED BASED ON QUESTIONS OR SYMPTOMS:
  - Patient educated to call SN on call number for symptom changes or concerns and when to call 911.
  - Other
- COMMUNICATION:
- PLAN FOR NEXT VISIT/TC:
  - Your next visit is scheduled for \_\_\_\_\_ this weekend. The nurse will call you to confirm the time when they will come out.

United Healthcare Medicare Advantage Case Management Plan  
Telephone Call Template & Script

Script: 2nd week

Hello (patient name).

**REASON FOR CALL:** The first two weeks home from the hospital tend to be challenging. I know we've been giving you a lot of information and it's been a couple of days since we've seen you. You probably have some questions. I'd like to ask you a few questions about how you are feeling, but first I'd like to know if you have any questions since your last home visit.

**PATIENT QUESTIONS:** What questions do you have?

**CONDITION ASSESSMENT & CHANGES:** Now I'd like to ask you some questions about your (disease/diseases). Have you had any changes or new symptoms since your last visit?

- ARE YOU HAVING ANY PAIN?
  - If yes - is this new or changed? Describe location, amount on a scale of 1-10, what relieves pain, pain scale when relieved
- ANY CHANGES WITH YOUR HEART? Pain/swelling in feet or legs/dizziness etc.
- ANY CHANGES WITH YOUR BREATHING? SOB/cough/wheezing etc.
- ANY CHANGES WITH YOUR BOWELS/URINATION? Constipation, diarrhea, pain, etc.
- ANY FEVER?
- HAVE YOU HAD ANY FALLS SINCE THE LAST VISIT?
- ARE YOU TAKING ALL OF YOUR MEDICATIONS AS PRESCRIBED?
- HAVE ANY OF YOUR MEDICATIONS BEEN CHANGED?
- WHEN IS YOUR NEXT MD APPOINTMENT?
- EDUCATION PROVIDED BASED ON QUESTIONS OR SYMPTOMS:
  - Patient educated to call SN on call number for symptom changes or concerns and when to call 911.
  - Other
- COMMUNICATION:
- PLAN FOR NEXT VISIT/TC:
  - Your next visit is scheduled for \_\_\_\_\_ this weekend. The nurse will call you to confirm the time when they will come out.