Teaching Exercise: Making an Out-Reach Phone Call

*Below are two example scripts for an out-reach phone call. Read each script and discuss which version your team prefers.*

***Example 1:***

**Diana** (MA and panel manager): Hello Mr. Smith, this is Diana.

**Mr. Smith**: Hello.

**Diana**: I sent you a letter two weeks ago about getting a new HbA1c lab test, but it looks like you didn’t go. We need you to go to the lab because it’s really important for your health.

**Mr. Smith**: I haven’t gone because I haven’t had time.

**Diana**: We need you to go to the lab tomorrow to get your HbA1c test.

**Mr. Smith**: No, I work tomorrow.

**Diana**: It is very important for your health that you go. You need to take care of your diabetes.

**Mr. Smith**: I will go when I can. Don’t call me; I’ll call you.

***Example 2:***

**Diana**: Hello Mr. Smith. This is Diana, calling from Dr. Alvarez’s office.

**Mr. Smith**: Hi, Diana. (Dr. Alvarez and Diana are a teamlet so Mr. Smith knows Diana.)

**Diana**: Is this a good time to talk?

**Mr. Smith**: This is fine.

**Diana**: How are you feeling today?

**Mr. Smith**: I am doing okay.

**Diana**: That’s good. Dr. Alvarez asked me to call you because it is time for you to have your lab test for your diabetes. The test is called HbA1c. What do you remember about the HbA1c test?

**Mr. Smith**: I’m not sure.

**Diana**: It is a measure of your average blood sugar for the past three months.

**Mr. Smith**: Oh yeah, my sugar test.

**Diana**: What did your last test tell you?

**Mr. Smith**: I think it was too high.

**Diana**: That’s right, the last time we checked your HbA1c it was above your goal, meaning that your diabetes was not being controlled. If it is okay with you, we’d like you to get a new HbA1c test so we can see how your diabetes is doing. Would that be okay?

**Mr. Smith**: Can I come early before I go to work? Where do I go?

**Diana**: Last time you went to the lab in the hospital. It opens at 7 a.m. I sent an order to the lab so they know that you will be coming. How do you feel about going back to the lab?

**Mr. Smith**. It’s fine. I’ll go next Wednesday. I have an appointment with Dr. Alvarez in two weeks.

**Diana**: Great. Let me know if you have any problems.

**Mr. Smith**: Thank you for the call, Diana.

*After reading and discussing these phone call examples, find a partner and practice doing a phone call about getting the HbA1c lab done. Switch roles so that both people play the part of panel manager. As a group, discuss the successes and challenges of the conversations.*

[**Teamlet**: A small team composed of a physician and staff person, such as his dedicated nurse and/or medical assistant. Teamlets provide continuity of care for patients and their families.]

*Source: AMA. Practice transformation series: panel management. 2015.*