

**SAMPLE SCRIPT:**            **Scheduling for Virtual Care Management Services\***  
**Target Patients:**            **CMS/Medicare Patients**  
**Target Staff:**                **Staff who contact patients to schedule visit** (could be nurse, other staff who will perform care management services, or admin staff)

*Note: This script can be adapted to work for other virtual visit types*

*“Hello. I am calling from xx health center.*

*In an effort to limit the spread of COVID-19, while continuing to meet the needs of our patients and community, we are changing how we deliver care. Right now, most care will be delivered virtually. I am calling to see about scheduling you for a virtual visit.”*

*“Your provider [provider name] has looked at your medical record and believes our care management program could help you with your health care. This is a personalized service we offer to Medicare patients [add other groups, as appropriate].”*

*“The program includes monthly phone calls from our team to answer your questions about your health or medications, and to help you to make appointments that can prevent medical problems. We can also work with you to create a care plan that meets your needs. We’ll do this over the phone, so you don’t need to come to the health center.”*

*“To get started, we need to schedule a call [if person other than individual who will see patient – specify the name or type of person patient will speak with, e.g., “nurse”]. Can we schedule an appointment for [suggest day/time based upon staff schedule and parameters below]?”*

*“We will schedule an appointment for x mins (see chart below for guidance).”*

Type of Care Management*	Timing of visit to be scheduled	Length of visit (minutes)
Chronic Care Management (CCM)	Month 1 1 <sup>st</sup> visit after initiating visit	60 mins (ancillary staff; could include provider)
	Months 2+	20 or more mins (ancillary staff; could include provider, if needed)
		60 mins (ancillary staff; could include provider, if needed)
		30 mins (provider only)
Behavioral Health Integration (BHI)	Month 1 1 <sup>st</sup> visit after initiating visit	60 mins/RN or other staff
	Months 2+	20 or more mins (ancillary staff; could include provider, if needed)
		30 mins (provider only)

*“Please note that I [or specify role/name of staff person who will be calling patient] may run a bit early or late for this appointment. We ask that you are ready 15 minutes before your scheduled time and be ready to wait 15 minutes after your scheduled time.”*

*“I will go over a few items so that you can be prepared for this visit (Review: **Patient Checklist: Preparing for a Virtual Visit**). Thank you. We look forward to your upcoming visit.”*