



CommunityConnect (CHWs) Telephonic First Call Script

The First Call Script Description: *This script should be used when making your **first outreach attempt** to clients to engage them into the program. During this call you will be **covering six sections** to successfully complete the first call and building rapport with your clients.*

*These sections include 1) introduce yourself & the program, 2) going over the quality of life questions, 3) providing the client with information about the appointment line, 4) the advice nurse & 5) MyCCLink/Chart, and 6) wrapping up the call with scheduling a time for a follow-up call (hence your **Next Outreach Date** with your client). This script is **ONLY** a guide to assist with any direction the conversation may lead to the best of our ability.*

*You are allowed to use your own words to be as comfortable & conversational as possible during your calls. **GOOD LUCK & “Remember, clients can always hear your smile”!***

Section 1 – Program Introduction

Case Manager: Hello, may I please speak with (Clients’ First and/or Last name). **Example:**
Hello, may I please speak with Jane Carter.

Case Manager: Hi (Clients’ name), my name is (your name) and I am a Case Manager with Contra Costa Health Services CommunityConnect Program. I was calling today to speak with you about the program. This call will take 5 maybe 10 minutes. Is now a good time for you?

Example: *Hi Jane, my name is Sarah Hampton and I am a Case Manager with Contra Costa Health Services CommunityConnect Program. I was calling today to speak with you about the program. This call will take 5 maybe 10 minutes. Is now a good time for you?*

Client Respond: “No”

Case Manager: Okay, no problem. When would be a better time for us to talk?

Instructions: *Document the outcome(s) of the call in the contact notes and schedule the “Next Outreach Date” for your follow-up call. Also put your follow-up call date in your appointment book.*

Client Respond: “Yes”

Case Manager: Wonderful! To make sure I am speaking with the correct person, can you please verify your date of birth?



Instructions: If the client does want to provide a Client Identifier... offer to resend the welcome letter & call back in a week. Record the plan for your Next Outreach Date in your encounter workflow and in your appointment book.

Case Manager: *(After the client provide their DOB)...* Thank you! You may have received a letter in the mail regarding CommunityConnect but I would like to give you a little bit of an overview. It is a new program that comes with your medical benefits and is of no cost to you. My role as your Case Manager will be to assist you over a period of time to link you to resources and supporting you with any needs or goals you may have. A few examples of things I may be able to help you with are transportation to your medical appointments, food security, access to medical and mental health services, as well as, many others. ***I may also contact you just to check-in on your well-being, if you are ever admitted to the hospital.***

Do you think this is something you could benefit from or are interested in the program?

Client Respond: "NO"

Case Manager: Okay. I will go ahead and disenroll you from the program; this will not affect your medical benefits. I will be sending you a letter in the mail notifying you that you were disenrolled. Is (client address) still a good address for you?

Example: Okay. I will go ahead and disenroll you from the program; this will not affect your medical benefits. I will be sending you a letter in the mail notifying you that you were disenrolled. Is 123 Broadway, Richmond Ca. 23143 still a good address for you?

Client Respond: "NO"

Case Manager: Okay what is a good address so that I may send you the letter?

Client Respond: My new address is 2354 Basement Ave. Hercules Ca. 23546

Instructions: Update the address in the Demographics section of CCLink and complete the disenrollment workflow. Disenrollment reason "Beneficiary Request".

Case Manager: Okay perfect! You will be getting the letter soon. Thank you for your time today! Bye. **Client**

Respond: "YES" (Do you think this is something you could benefit from or are interested in the program?) Case

Manager - Wonderful! I have a mandatory screening that consists of just two quick questions.

Section 2: Quality of Life (QOL)

Instructions: Case Managers ask and record the responses to the 2 QOL questions in the Social Needs Assessment



1. *In general, how would you rate your overall health? Poor, Fair, Good, Very Good, or Excellent*
2. *In general, how would you rate your overall mental or emotional health? Poor, Fair, Good, Very Good, or Excellent*

Case Manager: Thank you for answering both of those questions for me.

Section 3: Appointment Line

Case Manager: Do you have the number to schedule a medical appointment?

Client Respond: "YES" **Case Manager:** (states) Perfect!

Client Respond: "No" **Case Manager:** (states) I can provide you the number if you have a pen or I can mail you a copy, whichever is best for you. 1-800-495-8885

Section 4: Advice Nurse

Case Manager: I also wanted to briefly mention the advice nurse line, are you familiar with this service that's available to you 24 hours a day 7 days a week including holidays?

Client Respond: "YES" ... **Case Manager:** (states) Perfect! And you have the number? **(Instructions: If client states "YES" move on to Section 5)** **Client Respond:** "NO"

Case Manager: It is a nice service for those times when you aren't feeling well and aren't sure what to do. You can call the Advice Nurse and they can offer you valuable information on how to care for your illness or injury at home or help you decide if you should seek urgent or emergency care. The number is the same number you call to schedule an appointment, but I can provide you the number again if you have a pen or I can mail you a copy, whichever is best for you. 1-800-495-8885

Section 5: My CCLink

Instructions: Check to see if the client is ACTIVE ON MYCCLINK

Case Manager: I also wanted to mention mycclink, I see that you are active. How are you enjoying that service so far? (Discuss)... **If the client is NOT ACTIVE ON MYCCLINK... Proceed with the script.**

Case Manager: I also wanted to mention mycclink. This is an online management system for your medical; it provides you with the ability to make and cancel appointments, request prescription refills, view your test results, and send messages to your primary care doctor. Has anyone talked to you about this service before?



Client Respond: **“YES” or “No”**

Case Manager: Is this something you would be interested in signing up for? I would be happy to send you the information on signing up and your individualized activation code.

Client respond: **“YES”**

Instructions: Assist the client with the getting an activation code and steps to setting up their MyCClick account

Client Respond: “No”

Case Manager: Okay. If you change your mind in the future, please let me know and I will be happy to send you the information on signing up.

Section 6: Wrap-Up & Schedule Next Outreach Date

Case Manager: Thank you so much for your time today, that just about does it for this introductory call. Do you have any questions or concerns for me at this time?

Client Respond: “Yes”... Continue with their inquiries... If client respond: “No”

Case Manager: I would like to set us up with a follow up phone call, so that we may go over your social needs. Would **(APPOINTMENT DATE)** work for you? Do you have a preferred time that I should call that day? If you need me prior to that date please do not hesitate to give me a call. **(VERIFY YOUR NUMBER)** That is my direct line so please save that number so you may contact me if needed. Thank you again for your time and I hope you have a wonderful rest of your day. Bye.

Instructions: Record the NEXT Outreach Date in your appointment book as well.