

## Patient Navigator (community health clinics) COVID-19 Outreach Script

### Background

We are faced with a difficult burden in caring for our communities in the face of the COVID-19 pandemic. To contain the spread of the coronavirus it becomes even more important to involve our patients, families, and communities in becoming active partners in care. Staying at home and social distancing can save lives but it is also asacrifice. For our clients, this might mean less access to care and a lot more stress in their live.

As before the crisis, it remains our job to help our patients and families maintain theirbest physical and mental health.

But it will take some adjustments on our end. Here are a few guidelines for adjusting to this changing situation.

- **Patients should speak with their provider or clinical staff before proceeding to hospitals or urgent care.** Health systems are close to capacity. Unless patients are critically ill, they will not be admitted, and will likely NOT be seen. Please refer patients who feel they need medical attention to **clinical triage**.
- If the patient is describing acute changes in condition (difficulty breathing, chest pain, loss of consciousness) **immediately get a clinical team member to speak with them who can decide if an ambulance is warranted.** [Operations will have to decide if this is the appropriate plan or if there are other measures in place to address patients with urgent needs.]

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### Script for Patient Navigators Reaching Out to Clients

Hello, my name is \_\_\_\_\_ from \_\_\_\_\_ and your provider (name) has asked me to contact you.

#### **How are you doing today?**

(Listen for concerns that need medical attention-shortness of breath, high fever, cough, severe exhaustion (new). **Plan to refer to clinical team if unsure.**

*Before we get started, I want to let you know that I am not a nurse or doctor, but am a part of the support team (insert exact title), and therefore will not be providing medical advice such as a diagnosis or specific test results. My job is to help you connect to the care you need by asking questions about how you are feeling and your health. If you are*

*in need of speaking with a clinical team member, I will get someone to contact you today/within 24 hours/within XX hours\_\_\_\_\_ (explain timeframe for call backs).*

*We are calling to see how you are doing and to see if there is any support you need while we are being asked to shelter in place (stay home)duringthe coronavirus virus pandemic. Would it be all right if I ask you a few questions?*

If no, say thank you and ask if there is a better time to call back.

If yes, continue.

1. *Do you live alone, or with partners, family or friends?*
  - Note if person lives alone or other individuals are in the home
  
2. *Are you having any symptoms that you feel **cannot** be managed at home-such as*
  - *shortness of breath,*
  - *fever,*
  - *and cough?*

If **no** » continue to question 3.

If **yes** »then

» ask about seasonal allergies or hay fever. *Do you have*

- *Itching or stinging in the eyes?*
- *Runny nose and watery eyes?*
- *Are the symptoms relieved by allergy medications?*
- *Does it get worse when you go outside?*
- *Do you have a normal temperature and no body aches?*

If **no** » then clinical triage.

If you are in a clinical practice, check with your supervisor or clinical team member to see how you should handle patients that need to speak with a clinical team member. This could be a hand off to the provider's medical assistant or a nurse doing triage (doing a clinical assessment to see what level of care is needed).

If there are other people in the home, ask:

3. *Are other people in your home having any symptoms that you feel **cannot** be managed at home, such as*
  - *shortness of breath,*
  - *fever,*
  - *and cough?*

If **no** » continue with question 4.

If **yes** then » clinical triage. If you are in a clinical practice, check with your supervisor or clinical team member to see how you should handle patients

that need to speak with a clinical team member. This could be a hand off to the provider's medical assistant or a nurse doing triage (doing a clinical assessment to see what level of care is needed).

4. *Do you have all of your medications?*
5. *Are you in need of refills?*
  - If **yes** » facilitate standard refill process.
  - If the patient can call for their refill and obtain medication from the pharmacy, encourage them to do so. Be aware of not creating new procedures that will not be continued after the clinic reopens regular scheduling.
  - Ask (call if working remotely) the MA, nurse or provider for the refill if needed). Assist with calling pharmacy for delivery if needed. Follow standard order sets.
6. *Are you able to obtain resources and supplies on your own or with the help of others in your home?*
  - If living alone » *As a navigator, you will need to access 211 or refer patient to call if they are able. You may also need to utilize resources you already utilize in the community. Be sure to call and make sure businesses are open, and if they can provide the assistance that the patient is requesting.*
7. *How are you doing with managing your health needs right now?*
  - Probe-
    - *Please tell me how you take your medications.*
  - If taking medications as prescribed
    - *ASK» Are any of the medications new in the past few months?*
  - Any concerns/new side effects » clinical triage unless the patient has discussed issue with provider already.
  - If the patient is having new side effects (severe headache, nausea, vomiting, dizziness) or **anything they are worried about**, refer to clinical team for assessment(MA, RN, Provider).
  - Probe:
    - *How have you been able to take your blood pressure/ test your blood sugar/ do other chronic condition monitoring?*
  - If able to measure blood sugar, blood pressure, intake/output or other self-monitoring» affirm that the person is doing great.
  - If unable to self-monitor »
    - **(If available)** Make a telehealth appointment with the nurse educator. Or, advise the patient to seek help from the pharmacist. If you refer to a pharmacy, call and verify that the pharmacy has

measuring equipment and is willing to assist the patient with monitoring needs.\*\*\*This is not a time to start new monitoring procedures; this is only for measures the patient has been prescribed by the provider.

- Probe:
  - *Please describe the physical activity you are able to do while staying home.*
- If patient is physically active » affirm and encourage the person to continue with daily activity.
- If not » explore possible ways for the person to do safe activity at home.
  - *You can recommend exercise videos:*  
*Seated Upper Body Exercise Video, Kaiser Permanente:*  
<https://youtu.be/R6Nr-VaFcqM>

*Seated Exercises for Older Adults:* <https://youtu.be/8BcPHWGQO44>  
*Standing Exercises for Older Adults:* <https://youtu.be/mQLzNf8VOIc>

8. *Have you had to delay any medical appointments since the stay at home rule? If an appointment was delayed » Is there anything **urgent** that you would like to speak with the provider about before your next appointment?*
- If **yes** then» clinical triage –follow the procedure your team/organization has set for patients needing clinical advice\*

9. *Over the past 2 weeks, how often have you been bothered by any of the following problems? Please answer, with not at all, several days, more than half of the days, or nearly every day.*

<i>Little interest or pleasure in doing things</i>	<i>not at all</i> 0	<i>several days</i> 1	<i>more than half of the days</i> 2	<i>nearly every day</i> 3
<i>Feeling down, depressed or hopeless</i>	<i>not at all</i> 0	<i>several days</i> 1	<i>more than half of the days</i> 2	<i>nearly every day</i> 3

Instructions: Add up the answer to the two questions. If 3 or greater » then follow clinical screening practices.

10. *Do you have access to the CDC or State Health Department information on COVID-19?*

- If **no** » email or text patient CDC quick facts link. The facts change daily and patients should check directly with the CDC.

*11. Can you tell me what you would do if you get a fever, feel short of breath, or unwell all of a sudden?*

Have patients teach back what they learned.

*12. Can you tell me the difference between social distancing, self-isolating, and quarantining?*

If the patient has difficulties or needs to understand how to self-isolate because of active COVID symptoms » refer the patient to the [website of the Cleveland Clinic](#).

*13. What would you do if you are concerned about your health or your medications?*

Reassure patients that they can always call back here.

If a patient mentions any problems or concerns, you can address anything that is within your scope of work with patients directly. For example, a patient might have problems with:

- getting groceries » find resources
- loneliness » recommend how to stay socially connected while physically apart
- stress and anxiety » find mental health resources
- spiraling into a crisis » immediately connect to a mental health crisis line

Call patient-General support assessment call» Interview

**Scenario 1: Patient stable**



Provide assist with refills, food resources, transport, behavioral health

**Scenario 2: Patient having symptoms- (Fever, Cough, Shortness of Breath)**



Refer to clinical triage

(MA, RN, Provider » Severe symptoms (*pre-plan with clinical team how this should be handled (if you are remote, how can you access someone quickly)*)

**Scenario 3: Patient having symptoms (non-COVID) related but severe**



Clinical triage

**Scenario 4: Patient has clinical questions**



Clinical team to return call same day or within XX hours/days

**Scenario 4: Non-urgent clinical question**



Refer to designated clinical team member handling calls (MA, RN, Provider)

Other Resources

<https://www.cdc.gov/arthritis/interventions/programs/toolkit.htm>

*Developed April 2020 by:*

