

Still open – want to transition patients to telehealth

Use the following 4 parts to the conversation when someone calls to drop out of care during the outbreak:

→ **Acknowledge them → to calm them down**

- Use this script repeatedly until they calm down: *“I understand”*
- You may have to repeat it more than once as people are scared and worried that you’re going to make them come in.
- The goal is to calm them down, get them to relax and take a deep breath.
- Don’t move on until the patient appears to have calmed down.

→ **Tell them what you’re doing to keep them safe**

- Use this script: *“Hey Tom, I want you to understand there’s no pressure here. But I am going to let you know what we’re doing to keep our patients and staff safe during this time. [This is where you list the top 3 things you’re doing to keep everyone safe].”*
- Sound certain and confident. You’re making them aware, not forcing them to come in.

→ **Ask them one question**

- *“What do you think about this?”*
- You’re asking this to give them a chance to share any thoughts, worries, or objections, without asking them if they still want to cancel all their appointment.
- Also, it’s a great transition to what comes next...telehealth
- Handle any questions or concerns.
- If they tell you they’re going to cancel (which many will), you’re going to acknowledge their decision. Again use: *“I understand.”*

→ **Now transition them into telehealth**

- Say the following: *“Ok. I completely understand. This is what we’re going to do. We’re going to transition you to telehealth so we can continue with your care.”*

How you transition them:

→ **If you don’t explain it, they won’t agree to it.**

→ **Type up exactly what your telehealth will entail - what it looks like. Your front office or PT will impart this information. Make sure you include:**

- What it is – people don’t know what telehealth is – so you need to be able to tell them
- What you’ll provide them / what they’ll receive,
- How much time they should allow for treatment,
- What platform you’ll be using and options for accessing it,
- How many times per week you’ll meet and how to schedule,
- And the cost.

→ **Ask if they have any questions**

- This will open things up for objections, concerns, etc.
- It’s ok if they have questions or objections.
- These just mean they don’t understand something.

➔ **Handle their objections and concerns.**

- Don't tell them what to do, just give them the reasons behind this. How it will help them. The benefits to them.

➔ **Keep asking if they have any questions until they say "no".**

➔ **Once they say they have no more questions, transition them using this script:**

- "Ok. Great, let's go ahead and transition you to a telehealth program so we can properly manage this at home."
- Pause and wait for their answer.
- Remember they're likely to be stuck at home for awhile...so you're laying the groundwork now. Don't freak out if they say, "no thank you".

➔ **What do you do if they say no?**

- Use the following again: *"Ok. I understand."*
- Put them onto a "tele-help" list. For us, this is just going to be a list of patients we're checking in on each week.
- Then tell them you're going to continue to follow-up each week.
- Send an email with telehealth info - and tell them they can check in as well.
- Give them a number to call if their pain or problems increase.
- It's important that we follow-up each week.

Your patients have either dropped out already or you've closed your practice and you're trying to convert them to telehealth:

You'll be calling the patient with the intention of speaking to them. Ideally PT/PTA is the one calling to get them on their schedule. The conversation is a little different than for someone calling to drop off.

- ➔ **Start with some 'Pleasantries' – they should sound like you, not me...**
 - *How are you doing?*
 - *How's it going overall?*
 - *Are you working from home?*
 - *Do you have someone checking in on you?*
 - *Is there anything you need?*
- ➔ **Call to check in on them. Share your responsibility to them.**
 - Let them know it's your responsibility.
 - *"[patient name], I'm calling to check in because it's my responsibility as your provider. So, I'm checking in to see how you're doing and to make a plan moving forward."*
- ➔ **Do a verbal phone assessment on them.**
 - Have a list of questions to ask them about their problem.
 - It should be specific and something that can be added to their medical record.
 - You want all clinicians asking the same questions.
 - Not just, *"how's your pain?"*
 - What about motions that are difficult?
 - How they're sleeping...
 - What difficulties they're having at home...
 - You REALLY want to delve deeply here.
 - This helps you determine their needs.
 - And their problems and needs are what will help you transition to telehealth more easily.
- ➔ **Transition them into telehealth – lead them there using their answers to your verbal assessment.**
 - Your phone assessment will give you what you need to talk to them about telehealth. Use their answers to sell the telehealth plan.
 - Use this following script after conducting your verbal phone assessment: *"OK [patient name], based on the following, [this is where you review some of their key pain points] it's my determination that we need to transition to telehealth."*
 - Make sure you sound certain and are confident in your statement.
- ➔ **Explain what telehealth is.**
 - Patients do not know what this is. You need to tell them – describe it for them.
 - Have a specific description for your PT to use – it can be the same as the front office would use above...

→ **Ask if they have any questions.**

- This will open things up for objections, concerns, etc.
- It's ok if they have questions or objections.
- These just mean they don't understand something.
- **Handle their objections and concerns.**
- Don't tell them what to do, just give them the reasons behind this.
 - Explain why you're concerned.
 - Inform them what could happen if they avoid it.
 - How it will help them.
 - Provide the benefits of continuing while their home.
- **Keep asking if they have any questions until they say "no".**

→ **Once they say they have no more questions, transition them using this script:**

- "Ok. Great, let's go ahead and transition you to a telehealth program so we can properly manage this at home."
- Pause and wait for their answer.
- Remember they're likely to be stuck at home for a while...so you're laying the groundwork now. Don't freak out if they say, "no thank you".

→ **What do you do if they say 'no'?**

- Use the following again: *"Ok. I understand."*
- Put them onto a "tele-help" list. For us, this is just going to be a list of patients we're checking in on each week.
- Use this script: *"Ok. [patient name], this is what I'm going to do. I'm going to add you to our tele-help list. [Explain tele-help.] We'll continue to follow-up each week and see how you're doing."*
- Send an email with telehealth info - and tell them they should check in as well.
- Give them a number to call if their pain or problems increase.
- It's important that we follow-up each week. So, create a list for each team member to use to check in.
- At some point, you will be able to convert them if their symptoms increase. So keep checking on how they're doing.

Hope this helps! Please feel free to reach out if you have questions...



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