

RESCHEDULING CANCELLED PROCEDURE/ APPOINTMENT MESSAGING

General Considerations When Calling Patients:

- Everyone is experiencing stress and that is normal given the pandemic.
- The ways stress presents itself differs among individuals and may be characterized by varying levels of fear, irritability, distrust and even overwhelming optimism or an indifferent attitude.
- Stress activates our brain's amygdala, making it hard to respond to information.
- What can we do to help patients hear and understand the information we share?
 1. Provide ample and genuine validation and acknowledgement of the patient's emotions (regardless of how you feel about them). S.A.V.E. is a mnemonic device for identifying different types of empathic statements to better tailor our empathy to each person in a genuine and meaningful way.
 - **Support** – *I'm here for you.* OR *I'm going to talk you through every step so you know what to expect.*
 - **Acknowledge** – *This is a difficult time.* OR *You've been through a lot.* OR *I appreciate you saying that because it helps me understand your concerns.*
 - **Validation** – *Everyone is feeling more on edge right now.* OR *Most people would feel the way you do.*
 - **Emotion naming** – *You sound worried.* OR *It's frustrating.*
 2. Ask patients for their perspective with an open-ended question, listen actively and reflect back the feelings conveyed.
 3. Inform patients using clear, concise language. Then, ask what questions they have about the information provided.

Messaging When Calling Patient To Reschedule Cancelled Procedure/Appointment

Smile and greet warmly.

Hi, I'm calling from Cleveland Clinic. My name is [insert first and last name] and I am a [insert role/title]. May I speak with [insert name of consented contact]? Thank you.

(Note: Remember that a smile can be felt even over the phone.)

Tell the patient your name, your role and what to expect to quickly connect and reduce confusion.

My name is [first and last name] and I am a [insert role]. I'm calling to reschedule your appointment for [insert visit type/purpose].

Actively listen and assist when you can and ask for help if you need it.

After you assist the patient with the rescheduling, you can further help them by setting expectations:

To keep our patients safe, there are some changes you will notice when you arrive. These changes may look different, but are in place to protect our community. So you are not startled when you arrive, can I share some things that will be different? We check everyone's temperature and have hand sanitizers available as you enter. We also encourage everyone to wear masks, and you are welcome to bring one from home. We are also limiting visitors. This means that unless you need some special assistance, you should come to the appointment alone. (If your procedure involves an overnight stay in the hospital, please refer to our visitation exceptions.). All these steps will help us keep you safe.

Messaging When Calling Patient to Reschedule Cancelled Procedure/Appointment continued

Rapport and relationship-building will help get you and others through this time.

It's been a difficult time. How are you doing with everything going on? [Respond to patient's emotion with empathy.]

Thank patients, visitors and caregivers for all they are doing in a difficult situation.

I really appreciate your understanding about the delay, especially since it was less than ideal for you.

Messaging When Patient is Hesitant to Reschedule

Hear what they're saying without interrupting or expressing judgment. (Reflect what you've heard back to the patient.)

Safety concern: *You're hesitant to reschedule because of concerns about COVID-19 and staying safe. Is this correct?*

Financial concern (loss of health insurance/unable to afford): *Given the financial challenges you're facing, having [insert procedure/appointment] just doesn't seem possible right now. Is this correct?*

Situational change (unable to get time off, etc.): *Your circumstances have changed, so it isn't feasible at this time. Is this correct?*

Empathize in a way that feels genuine to you.

Safety concern: *It is scary thinking about going to the hospital and having a procedure when the pandemic hasn't fully resolved. I assure you that the health and safety of our patients and caregivers remains our top priority, and it is important that our patients feel safe to receive care in our facilities. For nearly two months and moving forward, we have taken steps to increase safety by limiting visitors and screening them for potential COVID-19 symptoms, providing essential PPE for caregivers, practicing physical distancing, expanding testing capabilities and continuing to clean our facilities extensively.*

Financial concern: *I appreciate you sharing that. This is such a difficult and uncertain time. Unfortunately, a lot of people are sharing similar concerns. I wish you didn't have to deal with any of this.*

Situational change: *It can be so frustrating to have everything all set to go only to have it cancelled and then not be able to reschedule. I wish things were different for you.*

Apologize for the situation and acknowledge it's difficult.

Safety concern: *I'm sorry to add more anxiety to an already tough situation.*

Financial concern: *I'm so sorry you've been affected financially by all of this. It's the last thing you need with all that is going on.*

Situational change: *I'm sorry you're going through these changes in an already tough situation.*

Respond to the best of your ability and reach out for help when necessary.

Safety concern: [First ask patient to describe his/her safety concerns; skip if they already clarified this.] *If I may ask, what concerns you most regarding safety?*

[Provide detailed information addressing their specific concerns.] *I appreciate you saying that. The safety of our patients and caregivers remains our top priority. We want to assure patients that our Cleveland Clinic facilities are safe for them to receive care. For nearly two months, we have taken steps to increase safety by limiting visitors and screening them for potential COVID-19 symptoms, providing essential Personal Protective Equipment for caregivers, practicing physical and social distancing, expanding testing capabilities and continuing to clean our facilities extensively. We are also requiring our caregivers to wear masks while at work.*

Financial concern: *Are there specific ways that we might assist you in thinking through the financial piece? If not, how about I check back with you in a few weeks to see how you're doing and whether anything has changed? You're also more than welcome to call us when something changes before then if you'd like to proceed with scheduling. How does that sound?*

Situational change: *Are there things we might do to assist you? If not, how about I check back with you in a few weeks to see how you're doing and whether anything has changed? You're also more than welcome to call us when something changes before then if you'd like to proceed with scheduling. How does that sound?*

Messaging When Patient is Hesitant to Reschedule continued

Thank them for sharing their concern.

Thank you for taking the time to talk with me today. I appreciate your openness because we want to help you in any way we possibly can. I hope you and your loved ones continue to stay healthy. What else can I do for you today?

Messaging for Presurgical COVID-19 Testing

One step to ensure your safety and that of your care team is testing to rule out COVID-19. It will be important to follow certain precautions until the test results comes back and then again until the time of surgery.

Safety Precautions

- Wash your hands often with soap and water for at least 15-20 seconds. If soap and water are not available, use a hand sanitizer with at least 60% alcohol.
- Avoid touching your eyes, nose and mouth with unwashed hands.
- Practice social and physical distancing by staying 6 feet away from others.
- Cover your cough or sneeze with a tissue, then throw the tissue in the trash.
- The CDC recommends wearing cloth face coverings in public, especially in places where it's hard to maintain at least 6 feet of distance between yourself and another person. Cloth face masks are being recommended because we now know individuals with COVID-19 could have mild or no symptoms and are still able to spread the virus to others. Wearing a cloth mask does not replace the need for physical distancing.
- Standard household cleansers and wipes are effective in cleaning and disinfecting frequently touched objects and surfaces.

Given the increased risk for patients who have COVID-19, we are currently only proceeding with urgent or emergency procedures for anyone who is diagnosed with COVID-19.

We'll use MyChart to communicate your COVID-19 test result.

Messaging for Day Before Surgery Phone Call to Patient

Smile and greet warmly.

Hi, I'm calling from Cleveland Clinic. My name is [insert first and last name] and I am a [insert role/title]. May I speak with [insert name of consented contact]? Thank you.

(Note: Remember that a smile can be felt even over the phone.)

Tell your name, your role and what to expect to quickly connect and reduce confusion.

My name is [first and last name] and I am a [insert role]. I'm calling to ask you a few questions and provide information for your [insert visit type/purpose] that is scheduled for tomorrow.

Actively listen and assist.

May I start with a few questions first? ___ Thank you.

[insert screening questions]

Next, I'd like to provide some information so you have an idea of what to expect. Do you have paper and pen there to take a few notes? ___ Thanks.

To ensure community safety, we have suspended all visitation and this can look different even for surgery patients. Since your surgery does not include an overnight admission, we will need your driver to remain in the car.

(There are some exceptions for visitors if the patient will have an overnight stay. One visitor can see patient same day post-operatively and one day following the procedure. For the latest visitor policy, please visit clevelandclinic.org/coronavirus.)

Actively listen and assist. (continued)

Please ask your driver to drop you off at [insert exact location with address].

If you need assistance upon arrival, please call the [insert caregiver role] at [insert phone number] and a caregiver will come to assist you.

When you enter the building, you will be asked to pause while a caregiver takes your temperature. If you don't have one already, there will be a cloth mask available that we will ask you to wear.

Last, we need a cell phone number to communicate with your driver on the day of surgery. A pager can be provided if the driver does not have their own phone. If you have that number now, I can document it for you. If not, please call back with the information as soon as possible.

Rapport and relationship-building will help get you and others through this time.

- If patient conveys significant emotion, engage them in conversation that builds rapport before proceeding with screening and education.
- Remember empathic statements are especially helpful to help manage emotion; remember S.A.V.E.
 - **Support** – *I'm here for you.* OR *I'm going to talk you through every step so you know what to expect.*
 - **Acknowledge** – *This is a difficult time.* OR *You've been through a lot.*
 - **Validation** – *Everyone is feeling more on edge right now.* OR *Most people would feel the way you do.*
 - **Emotion naming** – *You sound worried.* OR *It's frustrating.*

Thank patients, visitors and caregivers for all they are doing in a difficult situation.

I really appreciate you taking the time to answer our questions and discuss what to expect. It's a stressful time and we want you to be as comfortable and safe as possible.

What else can I do for you today?

Warm Transfer Techniques

- Ask permission to place someone on hold and give them your phone number.
- Connect with the caregiver to whom the call will be transferred.
- Briefly explain the situation and ask permission to transfer the call.
- Introduce the other caregiver to the caller and explain how they will help.
- Thank both people.
- Ask "Is there anything else I can do?"
- Hang up the phone.