

How to call a patient for scheduling

1. Introduction by Phone: “Your doctor has ordered home health ‘Physical Therapy’ for you. Therefore, I am calling to schedule your initial appointment, as your doctor prefers we come out to see you as soon as possible. I currently have a ‘2:00pm available on Friday,’ would that work for you? Or do you have another day and time that you prefer?”
   1. Make sure to paint the picture for the patient that *their* schedule is the most important. Don’t share your personal scheduling conflicts, rather offer other times that work for you and them. The number one complaint from a patient regarding a therapist is ‘they made it seem like their schedule was more important…I don’t care if their kid was sick, I need my therapy’….or… ‘they talked too much about themselves.’ Home health is FLEXIBLE, so have an idea of what your personal boundaries are before calling to schedule with a patient to alleviate any headaches from either end.
2. Key Questions to ask: Before I come out to see you, I just have a few questions to ask:
   1. Have you ever had home health therapy in the past?
      1. If not, home health therapy is covered by your insurance as long as you are considered homebound, meaning it is a taxing effort for you to leave your home. (Make sure they are homebound to prevent wasted time on your end and the patients end)
   2. Do you have any special instructions on where to park at your home?
   3. Any special instructions on how to enter your home?
   4. What is your current greatest challenge that you need home health therapy for? (this will help you plan wisely for a successful first visit)
3. Calling to schedule re-visits: “Hello my name is \_\_\_\_\_\_, PT/OT/ST home health. I met you at the initial evaluation on \_(ex.Monday)\_\_\_\_\_\_ and I am calling you today to schedule your next visit as your doctor approved the plan of care. How does Tuesday at 8:30am sound?”
   1. It is best to schedule regular visits if possible for the entire treatment plan to alleviate any confusion or missed visits (i.e. How does every Monday/Wednesday at 8:30am sound?).
   2. Always plot your visits on a calendar in the patients home for better customer service and decreased missed visits. This is a requirement from the conditions of participation for Medicare and customer service.