

How to present yourself at an Assisted Living Facility or Retirement Facility

\*\*\*You are constantly inadvertently marketing yourself in all interactions with families, patients, retirement facilities and doctors. So, always introduce yourself in a professional manner:

1. Introduction in person to facility: “Hello my name is \_\_\_\_\_\_\_\_\_, I am a ‘Physical/Occupational/Speech Therapist’ representing (Ex. “Accent Care/Alliant/Team Select etc”)\_Home Health. I am here to see one of your residents. Are there any specific processes I need to know about, such as who I leave the progress notes for after the treatment?”
   1. Sign in and out of the vendor list at each facility
   2. NEVER wear your Alpine Name Badge into a facility, unless you have the Alpine logo covered by a sticker indicating the company you are representing and if you have a surveyor with you.
   3. Make sure to bring a facility progress note (blank) to be filled out during your treatment with the patient and to leave with the wellness director (depending on the specifics of each building). Progress notes are typically needed for all ALFs, SNFs etc, but not needed for ILFs.
   4. Introduce yourself in the same manner to the wellness director or point person receiving your notes upon first visit. “Hello my name is \_\_\_\_\_\_\_\_\_, I am a PT/OT/ST representing (i.e. referring company). I just wanted to introduce myself as I am treating a resident in your building. I will leave progress notes each visit to keep you in the loop, but please feel free to reach out to me directly should you need additional information or have concerns.” The wellness directors will advocate for you and possibly refer patients directly to you/Alpine Therapy Services with this type of approach. This is where you can really market yourself!!!
2. Introduction in person to the patient: (*Offer to shake hands*) “Hello my name is \_\_\_\_\_\_\_\_\_, I am a ‘Physical Therapist’ representing (Ex. Accent Care/Alliant/Team Select” Home Health. It is a pleasure to meet you. As mentioned by phone, I am here to initiate your (PT/OT/ST) home health therapy. Thank you for letting me come to your home today.”
   1. “First, I’d like to ask if there are any details you prefer when I enter your home” (i.e. take my shoes off, knock and then enter).
   2. “Second, do you have any scheduling preferences moving forward” (i.e. do you prefer mornings, afternoons etc).
   3. “Third, please remember I am here to help you per doctor’s orders. It is important that we develop a treatment plan together in which we are both in agreement to prevent missed visits and assist you in meeting the highest level of functional independence.”
   4. “Now, let’s get started with the evaluation/treatment.”
   5. Remember that patients in facilities talk amongst themselves about their favorite therapists, so again remember you are marketing yourself in every face to face encounter with these facilities.
3. Exiting the home: After completing the visit or evaluation, clean up any items you might have used (please refer to the bag technique for details); clean your hands and offer another hand shake.

“Thank you so much for your time today, and thank you for allowing me to evaluate you. It was a pleasure meeting you and I look forward to working with you in the future. I wrote my number on your calendar should you need to call me with questions, concerns, or if you need to reschedule a therapy session. I will see you next time.”

* Eye contact is key
* Bag tech upon entering/exiting the home is key
* Dress professionally and remember to wear closed toed shoes
* Wear proper foot wear and be prepared with shoe covers, should the patient request you to take off your shoes or wear covers depending on your comfort and theirs.
* Remember to *smile* over the phone and in person, this will alleviate the patient’s anxiety and anticipation of you coming to their home. (They are likely to be nervous, as their home is their sacred place and they need to learn to trust you with excellent customer service)
* If you need to step out or take a call, please remember to say “excuse me for just a moment” or “just a moment please.” NEVER take a call unless it is absolutely necessary while you are with a patient. Time is valuable.

Always ask if it is ok that you document your notes while in the home. Some patients do not appreciate the attention on your tablet/phone rather than quality treatment time 1:1. Therefore, explain and ask them upfront if they mind if you document during the treatment