



## FIRST Outreach Referral Relationship COLD-CALL Script (Receptionist)

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“Good Day,

My name is [YOUR NAME] and I am calling on behalf of [YOUR PRACTICE]. We refer many of our patients to [Dr. TARGET] necessitating the need to share patient information.

(If TARGET provider participating in EHR Program)

We see from our records that you use the [EHR NAME] EHR (Electronic Health Record System). We use one as well. Can you connect me with the person in your office who manages your EHR system? We would like to determine if you have a similar capability or would be interested in exploring ways we can both better electronically exchange patient referral and other records of care information.”

(If TARGET provider participating in EHR Program)

[YOUR PRACTICE] has adopted an electronic health record (EHR) system that allows us to communicate patient information electronically. We would like to determine if you have a similar capability or would be interested in exploring ways we can both better electronically exchange patient referral and other records of care information for our patients.”

### Notes:

1. Capture the name of the person you initially speak with.
2. Capture the name of the EHR support person and number if different from number you called
3. Capture results and next steps for [YOUR PRACTICE’S] roadmap documentation.

## SECOND CALL (With EHR Staff Person)

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“Good Day,

My name is [YOUR NAME] and I am calling on behalf of [YOUR PRACTICE].

We are participating in the CMS (Centers for Medicare and Medicaid Services) EHR incentive program. We’d like to see if you are as well and if we can send you information on the patients we refer to you electronically using DIRECT secure messaging or some other electronic HIPAA compliant means?. [IF THEY ARE MU PARTICPANT] Since we both have to meet MU (Meaningful Use) we could help each other out by sending transitions of care electronically.

Do you have a DIRECT email address?"

1. Answer: "Yes"
  - a. Offer to continue the discussion through email to exchange DIRECT email address information and the scheduling of a test of the EHR to EHR connection.
  - b. Capture Name, Phone and email address of EHR person.
2. Answer: "No"
  - a. "How are going to meet the requirements of MU (Meaningful Use)?" Do you have another way and sending and receiving transitions of care?
    - i. Capture information that is shared.
  - b. Encourage the person to talk to their vendor and share that "as part of the CMS EHR Incentive program their vendor should have given them the ability to do secure messaging using the CMS created DIRECT standard."
  - c. Provide your Connecting Healthcare email address and our office line **[YOUR PRACTICE NUMBER]** so that they can follow-back with us if things change or we can help them in the conversation with their EHR vendor.
  - d. Capture results for **[YOUR PRACTICE's]** roadmap documentation.
3. Answer: "Not Sure"
  - a. Encourage the person to talk to their vendor and share that "as part of the CMS EHR Incentive program their vendor should have given them the ability to do secure messaging using the CMS created DIRECT standard."
    - i. Also share that if they are participating they have to meet specific HIE (Health Information Exchange) measures for communicating transitions of care.
      1. **MU requirements: 10% of referrals and transitions of care have to be electronic.**
  - b. Provide your email address and your office line **[YOUR PRACTICE NUMBER]** so that they can follow-back with your as they talk to their EHR vendor and offer to help them in any way we can during the conversations with their EHR vendor.
  - c. Capture Name, Phone and email address of EHR person.

**Notes:**

1. Capture the name and email address of the EHR support person and number if different from the office number.
2. Capture results and next steps for **[YOUR PRACTICE's]** roadmap documentation.

### END OF CALL SURVEY: Results of Previous Outreach Attempts

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During the call with the EHR person, mention that we made several attempts to contact them by email and several by fax but did not hear back.

**[IF YOU HAVE A DIFFICULT TIME REACHING SOMEONE]** “Your feedback is helpful. We always want to engage in the outreach that is best for all. Before I called today, I sent several emails and several faxes that were not responded to. For our learning, can you share any thoughts on those previous outreach attempts?”

Suggest other thoughts based on the conversation. “Was the email or fax perhaps not clear enough in why and how we are assisting **[YOUR PRACTICE]**?”

**Notes:**

1. Capture results.