

## PATIENT ACTIVATION TOOLKIT OVERVIEW

This communications toolkit has been created to help you reach patients who may be hesitant or fearful of visiting healthcare providers during COVID-19. All content was designed to be customizable in order to fit the needs of your practice; there are indicators in the copy to provide direction on personalization.

Here is what is included in your toolkit:



- I. **EMAIL TEMPLATES:** Included are three sample email texts that can be copied and pasted directly into your office's email platform. These emails were written to be delivered in sequence.
  - a. **Introductory email** – this can be sent to all patients at the same time. This effort supports your availability and the precautions you and your staff are taking to support a safe environment for in-person visits. This email should also include all the ways you are currently able to interact with your patients.
  - b. **Appointment reminder email** – use this as part of your queue/annual reminders process. This message includes copy reiterating the safety precautions you and your staff have in place. Intent of this message is to get people back in the mindset of making and keeping appointments.
  - c. **Prior to visit** – example of what can be included in an appointment confirmation message. This is where you should outline things your patients need to know in order to prepare for their visit.



- II. **DIRECT MAILER:** If your patients prefer print messages, here is content that can be used as a formal letter drop or direct mail postcard. Both options are included.



- III. **RADIO/VIDEO SCRIPTS:** Radio provides direct access to local members of your community, with dedicated time to share information and get your message out. We've included scripts for fifteen, thirty and sixty second spots. These can be used for video messages as well.



- IV. **DIGITAL ADS:** Digital ad copy can be used to replace any existing ad template you are currently running or sponsoring. Always feature your clinic's name and contact method.



- V. **SOCIAL MEDIA POSTS:** Utilize your office's social media handles with copy developed specifically for Facebook and Twitter. All need to have a link back to how to best contact your office with questions and to schedule an appointment.



- VI. **WEBSITE COPY:** This copy can be customized to announce your office hours, location and how you are giving appointments (in person, telephonic, video).



- VII. **FREQUENTLY ASKED QUESTIONS:** To help address anticipated questions that you may receive from your patients during this time, included is a FAQ featuring sourced, draft responses. As with the other materials, this can be tailored to reflect your practice's protocols.

## EMAILS



### Email 1: Outreach to all patients

TO: **PATIENT**  
FROM: **DOCTOR**  
SUBJECT: **OUTREACH**

Dear **PATIENT**,

As your **INSERT SPECIALITY** health care team, we want to thank you for your support as we navigate these unparalleled changes in healthcare. While a lot has changed, there is one thing that hasn't – our commitment to you and your wellbeing.

Our offices are open, and our physicians are available to see you, both in person and virtually. While we welcome visiting with you by phone or video conference, if you should choose an in-person visit, rest assured that we are taking extra precautions to keep you safe by following the safety protocols established by the Centers for Disease Control as well as our own stringent standards. Recent changes we've made include:

- Performing routine deep cleaning of the entire office environment
- Reconfiguring our waiting area to conform with physical distancing strategies
- Requiring masks to be worn by all individuals onsite
- Not allowing companions unless deemed an essential caregiver by staff
- Ensuring that no office staff will be in the facility if they are ill or have had direct exposure to someone who has COVID-19
- Providing hand sanitizing dispensers throughout our facility for your use

To further support these protective measures, we do require that if you have experienced any of the following symptoms you stay home and we will make arrangements to have our clinicians work with you remotely.

- Fever  $\geq 100.4$  degrees F
- Respiratory symptoms (coughing, congestion, difficulty catching a breath)
- Chills
- Loss of taste and or smell
- Intense exhaustion and/or muscle aches

If you are experiencing the above symptoms, please refer to the guidelines provided by **INSERT LOCAL COVID19 TESTING RESOURCE HERE**.

Finally, we understand that you may have reservations about being in a hospital at this time. We want to assure you that we are partnering with the hospitals to provide a SAFE hospital experience for you.

We feel fortunate to be your chosen healthcare providers; it is a role we take very seriously. We are, and will continue to be, here for you and together we will address your healthcare needs in the safest possible way.

We look forward to seeing you soon,

**OFFICE/Dr SIGNOFF**



## EMAILS (CONT'D)

### EMAIL 2: Initial appt email

TO: **PATIENT**  
FROM: **DOCTOR**  
SUBJECT: **OUTREACH**

Dear **PATIENT**,

Our records show that you are due for **TYPE OF APPOINTMENT** on **DATE**. Please call our offices at **(NUMBER)** to make arrangements for your visit.

We understand that you may have some concerns related to COVID-19, and we want to assure you that we are following the safety protocols established by the Centers for Disease Control in addition to our own stringent standards to keep you safe during your appointment.

Upon confirmation of your appointment, we will send you detailed instructions to help you prepare for your visit.

We look forward to seeing you soon!

**OFFICE/Dr SIGNOFF**

### EMAIL 3: Email on new Office Protocol/prior to attending appointment

TO: **PATIENT**  
FROM: **DOCTOR**  
SUBJECT: **OUTREACH**

Dear **PATIENT**,

We are looking forward to seeing you on **DATE** and **TIME** for your appointment. As you prepare for your visit, we want to assure you that we are taking every precaution possible to ensure our facility is safe. Here are the things we are doing:

- Deep Cleaning the entire office environment
- Staff are required to wear masks at all time
- We have reconfigured the office to insure appropriate distancing of all visitors

To help maximize our safety efforts, here are the things we need you to do:

- Inform us of any increased body temperature, congestion or recent travel
- You will need to wear a mask while onsite; if you do not have one, we will provide it for you upon arrival
- Only ONE adult companion is allowed to come with you
- Due to distancing rules, making and keeping your appointment will be imperative, so please call **NUMBER 15** minutes ahead to alert our receptionist of your arrival.

We look forward to seeing you soon,

**OFFICE/Dr SIGNOFF**

## DIRECT MAILERS



### FRONT

### BACK

#### Postcard Option 1

**Your health matters**

Don't let COVID-19 keep you from getting the care you need for existing health conditions. Many serious conditions can be treated successfully if care isn't delayed. Our office is open, and we are taking every precaution to ensure your safety. Please call **NUMBER** to schedule your appointment today.

#### Postcard Option 2

**Social distancing  
means nothing to  
DISEASE STATE**

If you are experiencing **SYMPTOMS**, please do not wait to get the care you need. Our office is open and we are taking every precaution to ensure the safety of your visit. To schedule an in-person or virtual appointment, please call **NUMBER** or visit our **WEBSITE**. As always, in case of an emergency, dial 9-1-1.

#### Postcard Option 3

**You have supported us.  
Let us support you.**

Thank you for supporting our healthcare teams as they battle COVID-19. We now need to get back to caring for you and your non-COVID related health concerns. Our office is open, and we are taking every precaution to ensure the safety of your visit. We also offer phone and video appointments. Please call us at **NUMBER**/visit our **WEBSITE** to schedule your appointment today.

#### Postcard Option 4

**The Doctor is In!**

We are offering in-person, video and telephone visits for all existing and new patients. Please contact us today at **INSERT NUMBER/WEBSITE** to schedule an appointment.

## DIRECT MAILERS



### Form Letter

## INSERT LOGO/LETTERHEAD HERE

Dear Patient,

As your **INSERT SPECIALITY** health care team, we want to thank you for your support as we navigate these unparalleled changes in healthcare. While a lot has changed, there is one thing that hasn't – our commitment to you and your wellbeing.

Our offices are open, and our physicians are available to see you, both in person and virtually. While we welcome seeing you over video, we want you to know about the precautions we are taking to keep you safe within our clinic as we are following the safety protocols established by the Centers for Disease Control in addition to our own stringent standards. We are:

- Performing routine deep cleaning
- Reconfigured our waiting area to conform with physical distancing
- Requiring masks to be worn by all individuals onsite
- Not allowing companions unless deemed an essential caregiver by staff

During these uncertain times, we know that you may have questions about your current state of health, status of your procedure and the safety of coming into our office. To help you get the answers you need, our **STAFF** are available at **NUMBER** and they are ready to address all your concerns. They can also help schedule your appointment in order to ensure you are getting the care you need.

We feel fortunate to be your chosen healthcare providers; it is a role we take very seriously. We are, and will continue to be, here for you and together, we will address your healthcare needs in the safest possible way.

We look forward to seeing you soon,

**OFFICE/Dr SIGNOFF**



## RADIO/VIDEO SPOTS

### Provider/Clinic

#### Ad: 20/30 Seconds:

COVID-19 has changed our routines, but it hasn't stopped the need for medical attention for **INSERT CONDITION**. The team at **INSERT INSTITUTION NAME** is here to help you. We're taking every precaution to keep you safe while caring for your needs. **OPTIONAL**: If you are not able to see us in person, we are also offering phone and video appointments. Please call **INSERT NUMBER** or visit us at **WEBSITE** for more information.

#### Ad: 15 Seconds:

COVID-19 has changed our world but please don't let it keep you from getting the **INSERT DISEASE STATE** care/screening you need. Our teams at **INSERT INSTITUTION NAME OR TYPE**: clinics/offices/hospital/care center are ready to help you safely. Please call **INSERT NUMBER** or visit us at **WEBSITE**

### Hospital

#### 60 Seconds:

Hi, I am **INSERT ADMINISTRATOR/CEO NAME, TITLE, INSTITUTION NAME** and I want to thank you for your support and gratitude for our healthcare workers in the battle against COVID-19. Our team has been amazing in addressing the unique challenges presented by this pandemic. We also want to make sure that you are getting the care you need for non-COVID related health issues such as **INSERT CONDITION(S)**. Many conditions, such as these, can be treated successfully, particularly if there is not a delay in getting care. Our hospitals, clinics and emergency rooms are open and taking every precaution to ensure your visit with us is safe. We are also offering video and telephone appointments. And as always, in case of an emergency, please dial 9-1-1. COVID-19 has taken a lot from us. Please do not let it keep you from getting the critical care you need. For more information, please visit **INSERT WEBSITE**.



## DIGITAL AD COPY



### Option 1

Don't let COVID19 keep you from getting the care you need.

Our office(s) is/are safe and your care team is ready to help

CONTACT US TODAY > [link to website](#)

### Option 2

The Doctor is In...

In- person, virtual and telephone consultations are now available.

Your health matters. Set up your appointment today > [link to website](#)

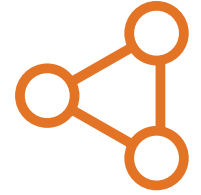
### Option 3

This doctor makes house calls

Virtual and telephone visits now available for just **\$XX**

SCHEDULE TODAY ([Link to website](#))





## SOCIAL POSTS

### Facebook



Our office is open and we're taking every precaution to ensure the safety of your visit. We have phone and virtual appointments. Please call us at **NUMBER**/visit our **WEBSITE** to schedule your appointment today.

<<NEED IMAGE/Use Hospital or Office Logo>>

### Twitter



Experiencing **SYMPTOMS**? Don't let #COVID19 keep you from getting the care team you need. **@INSERT HASHTAG FOR OFFICE/HOSPITAL** is offering in-person and remote consultations. Contact us today.

<<IMAGE OF LIST OF SYMPTOMS>>

### Twitter and Facebook: Re-sharing Recommendation

Providers may be able to leverage posts from the following agencies to support their messaging for re-engagement:

[@CMSSGov](#)

[@AmerMedicalAssn](#)

[@CDCgov](#)

[@ahahospitals](#)





## WEBSITE COPY



**Header: In-person, video and telephone visits are available!**

**HOURS OF OPERATION**

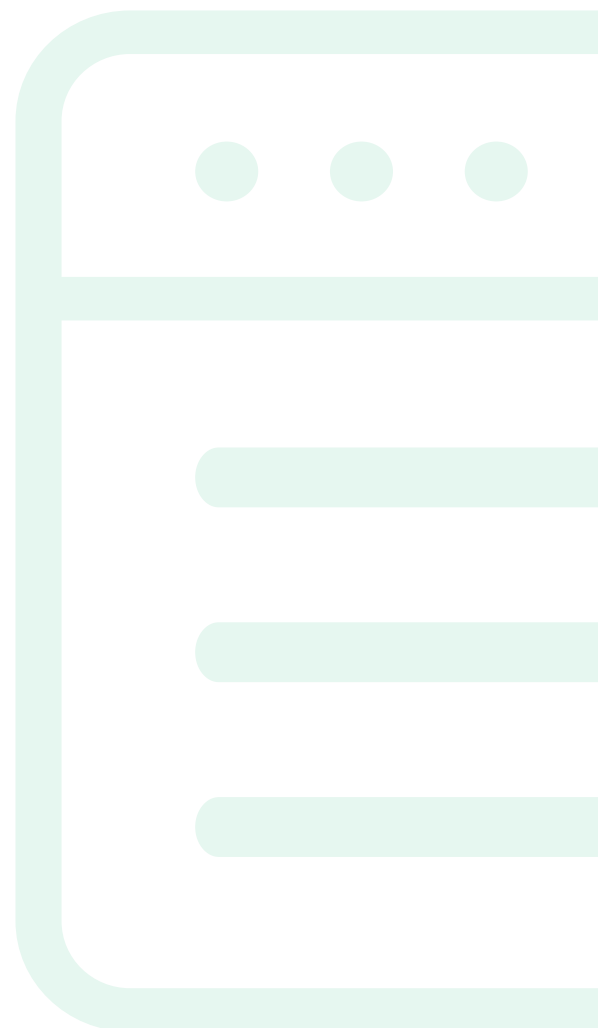
**PHONE NUMBER**

Body:

As your **INSERT SPECIALITY** health care team, we want to thank you for your support as we navigate these unparalleled changes in healthcare. While a lot has changed, there is one thing that hasn't – our commitment to you and your wellbeing.

Our offices are open, and our physicians are available to see you, both in person and virtually.

During these uncertain times, we know that you may have questions about your current state of health, status of your procedure and the safety of coming into our office. To help you get the answers you need, our **STAFF** are available at **NUMBER** and they are ready to address all your concerns. They can also help schedule your appointment in order to ensure you are getting the care you need.



# Frequently Asked Patient Questions



## Facility Status and COVID-19 Infections

1. Is your site open? For what types of visits?

***Insert your practice's response here***

Yes, even in this time of uncertainty, our practice is a place for hope and healing — and we're delivering the care you need. We're safely treating all patients, both in person and through virtual visits, in adherence with federal and state executive orders and guidance. We welcome both new and existing patients for in-person and virtual care.

2. If the site has been closed, when do you plan to re-open? What guidance are you following to make these decisions?

***Insert your practice's response here***

We plan to re-open once we have ample supplies of personal protective equipment (PPE) and full support for COVID-19 testing in adherence with federal and state executive orders and guidance.

## New Safety Precautions and Patient Expectations

3. How are you screening patients for COVID-19?

***Insert your practice's response here***

We are screening all patients for symptoms and possible COVID-19 exposure via a door screening process where you'll be asked a series of COVID-19 screening questions and take a temperature check before entering our buildings.

4. What are your new precautions to minimize risk of COVID-19 transmission?

***Insert your practice's response here***

When you visit, you'll notice:

- Strict limits to the number of people on campus
- Carefully monitored entrance points
- Screening of all patients for symptoms and possible COVID-19 exposure before entering our buildings
- Universal masking required for all patients, visitors and staff
- Waiting areas arranged for social distancing
- Enhanced cleaning of exam rooms and equipment after each patient
- Frequent deep cleaning of other clinic spaces



5. How should patients check in for their appointments?

***Insert your practice's response here***

When you arrive, our staff will welcome you at your designated entrance. They'll guide you through our door screening process, including:

- COVID-19 screening questions
- A temperature check

If your door screening goes smoothly, you'll be reminded of important clinic safety guidelines, including use of masks, social distancing and visitor policies. Then, you can head to the floor for your appointment. If any symptoms or questions come up during your door screening, you'll meet with a nurse right away for additional screening and testing for COVID if needed.

6. Are patients and visitors required to use masks?

***Insert your practice's response here***

We require all patients, visitors and staff to wear a face covering or mask while on our campuses to guard against COVID-19 transmission. Please bring your own face mask or covering with you.

7. How are you enabling social distancing measures within your office?

***Insert your practice's response here***

Our staff has taken special precautions to protect you in all waiting areas. You'll see:

- Extra supplies of hand sanitizer available to all
- Masking and social distancing guidelines posted and monitored by staff
- Seating arranged and marked to promote social distancing
- Robust cleaning and sanitizing practices
- Separate waiting areas for visitors with possible COVID-19 exposure

8. Will staff be required to take training related to these social distancing measures?

***Insert your practice's response here***

We take patient and staff safety seriously. We have detailed and thorough plans for patient care and protecting staff. Our healthcare staff at all locations have been trained and are prepared to care for patients and keep them safe from further infection.

9. Are you offering hand sanitizer or disinfectant wipes? Are you requiring patients to use these upon entry?

***Insert your practice's response here***

Extra supplies of hand sanitizer will be available to all patients, visitors and staff throughout our offices. We are not requiring patients and visitors to use hand sanitizer upon arrival, but strongly encourage it along with handwashing often.



10. How are you physically separating patients with COVID-19 from those without?

***Insert your practice's response here***

We have completely separate designated waiting areas, offices and patient beds for visitors with possible COVID-19 exposure.

11. What PPE will staff be wearing?

***Insert your practice's response here***

A mask – N95 or better – and gloves.

12. What is your visitor policy?

***Insert your practice's response here***

Patients in the outpatient clinic may have only one individual accompany them, with consideration for special exceptions determined by patient care teams. Please leave children under age 13 in the care of someone else at home unless they are receiving care at the clinic.

Patients in hospital units and the emergency department may have only one person visit them during their hospital stay. Visitors will not be allowed if the patient has a confirmed or suspected case of COVID-19.

- Exceptions may be made to allow more visitors for end-of-life care, hospitalized children, and other rare and unique circumstances.
- The visitor can come and go during approved visiting hours, but throughout the patient's stay, only one person can visit.

13. If a patient cannot have someone accompany them to a visit, can that person dial in to the visit?

***Insert your practice's response here***

We know that not having someone come with you can be an inconvenience and a potential source of stress. We are encouraging patients to have their care provider or loved one dial in during the visit. This can help answer questions and provide information that helps all members of your health care team.

#### **Sources:**

<https://www.cdc.gov/coronavirus/2019-ncov/php/principles-contact-tracing.html>

<https://www.telehealthresourcecenter.org/covid-19-resources/>

<https://health.usnews.com/conditions/articles/a-beginners-guide-to-a-virtual-doctors-visit>

<https://www.hhs.gov/sites/default/files/telehealth-faqs-508.pdf>

<https://www.mayoclinic.org/covid-19>

14. How are you handling payment and appointment follow up?

***Insert your practice's response here***

We are following the Centers for Disease Control protocol in disinfecting our front desk area, including where we accept payments and co-payments. Our staff will be taking the necessary precautions set for handling payment methods, including disinfecting our credit card processors, pens and writing surface.



15. Are you doing contact tracing?

***Insert your practice's response here***

In accordance to local guidelines and guidelines provided by the Centers for Disease Control for contact tracing, a core disease control measure employed by local and state health department personnel for decades, is a key strategy for preventing further spread of COVID-19. Should any of our patients be diagnosed with COVID-19, we will work with local health personnel to inform those who may have been exposed to the virus. We do this to ensure that those who may be in need of obtaining care can do so in a timely manner and self-isolate per established protocols.

### **Guidance on Telehealth Availability and Usage**

16. Are telehealth services available for patients?

***Insert your practice's response here***

Video and phone visits can be great options for appointments before, after or in place of face-to-face care. Appointment coordinators will recommend a virtual or telephone visit if it best fits your individual needs.

17. Are all providers in the practice available via telehealth? If not, how will I know if my provider is available for telehealth?

***Insert your practice's response here***

All of our providers and nursing staff are available for telehealth visits. In addition to meeting with your physician, you may be scheduled to meet with our nurse practitioners.

18. How long will patients typically have to wait for a telehealth appointment?

***Insert your practice's response here***

The process and wait time is similar to scheduling an in-person visit. When we receive your appointment request, we will call you for scheduling. Appointments are made based on availability of your care provider and the time needed to provide you with focused care.

19. What types of services can be handled effectively via telehealth?

***Insert your practice's response here***

Almost any exam be conducted via a virtual visit, but certain types of visits may be more effective via telemedicine such as new patient and follow up visits. If your treatment plan requires diagnostic testing and lab work, together, we will make the appropriate arrangements for next steps.

20. How can patients schedule a telehealth appointment?

***Insert your practice's response here***

Please contact our appointment scheduler as you normally would and request to set up a video visit with your provider. Following the set up of your appointment, we will provide you with detailed instructions that includes the time of your visit and detailed instructions for downloading the free, secure app we use for video visits.

If preferable, this visit can also be held over a phone call.



21. How long is a telehealth appointment and do patients need to do anything to prepare?

***Insert your practice's response here***

We allocate the same amount of time needed to address your needs whether in-person or via virtual and/or phone.

It is important to prepare for this visit the same as if you were coming in to see us.

To maximize the effectiveness of your visit, please do the following:

- Fill out any paperwork or make sure what we have on file is up to date.
- Check with your insurance company to ensure coverage for your visit.
- Write down any questions or points you want to raise with your provider. Include symptoms, recent monitoring such as blood pressure or glucose levels and list of current medications. Keep your pen and paper nearby for new notes.
- Test your equipment by ensuring your phone sound is on and that your camera has access to the app you have downloaded.
- Plan where you want your visit to take place. This may be best in a private, quiet setting to minimize interruptions during your visit.
- Consider having someone else join you. It might be helpful to have a family member sit on the call with you to help take notes or to raise other concerns with the provider if you forget something.
- Minimize distractions so that you can give your provider your undivided attention. Shut off notifications on your cell phone and shut down apps that might create distractions or noise.

22. Once an appointment is scheduled, what will happen next? How do I know next steps for connecting with my provider at the time of the telehealth appointment?

***Insert your practice's response here***

Upon confirmation of your appointment, we will provide you with detailed instructions that includes the time of your visit and detailed instructions for downloading the free, secure app we use for video visits.



23. What digital platform is used for telehealth appointments?  
Will I need to download any software beforehand?

***Insert your practice's response here***

In order to ensure the privacy of your visit, we utilize SYSTEM, an encrypted video platform that works with both Android and Apple platforms as well as with your home computer. This service is like a phone call, but more secure and interactive. Once your appointment has been scheduled, we will send you detailed instructions on how to download and prepare for your virtual appointment.

24. How are telehealth appointments billed?

***Insert your practice's response here***

Due to the impact of COVID19, the Centers for Medicare & Medicaid Services (CMS) has broadened access to Medicare telehealth services so that beneficiaries can receive a wider range of services from their doctors without having to travel to a healthcare facility. Many private insurers have also expanded what they'll cover related to telehealth. If you have any questions, please contact your insurance provider or contact our business office as we may be able to provide you with information.

### **Contact Us with Questions or Concerns**

25. What are the various channels for getting in touch?

***Insert your practice's response here***

For any question regarding your care, please contact us at INSERT NUMBER. The prompts will guide you to the options for contacting our schedulers, nurse line and business office. You can also visit our website at INSERT WEBSITE. We are also on Facebook and Twitter INSERT SOCIAL HANDLES.

26. If patients' portals are an option, how can patients sign up for an account?

Please visit **INSERT LINK TO PATIENT PORTAL** to set up your account. Here you will be able to keep track of past appointments, view test results and keep track of future events. You can also use this portal to send private and secure messages to the staff who will then manage your inquiries as appropriate.

27. How long will it take to get a response?

***Insert your practice's response here***

Your health is our primary focus and therefore, we will contact you immediately if there is anything we need to discuss regarding the immediacy of your care. For questions about appointments, please contact us at INSERT NUMBER to speak with one of our schedulers. For inquiries submitted through our website, we try our best to respond to all patients within 24 hours for non-emergent responses.