

TROUBLE-SHOOTING PATIENT FOLLOW-UPS

Occasionally, care managers will run in to problems with tracking down patients for follow-up calls or meetings with the care managers. Here are some suggestions about how to track these “hard to reach” patients. The care manager should follow-up with patients to the point that they feel is appropriate.

1 Collect two or more phone numbers to contact the patient

Be direct and ask for a stable friend/family members telephone number &/or address
Request that they call you if they have a telephone number or address change
Provide a wallet size card with your contact information
Provide a telephone number with voice mail

2 Approach the patient when they come in to the clinic for another appointment

Be positive with the patient and show joy in seeing patient
Give encouragement about keeping this clinic appointment
Attempt to have a session with patient at this time or schedule an appointment

3 Send the patient a mail reminder to their billing address

Put a copy of the reminder in the patient record for other clinic staff to notify you when the patient comes in for other appointments
Included the clinic staff in helping the patients keep appointments with you

4 Contact a relative or other person close to the patient who might have contact with the patient

Be careful with this method of contact d/t confidentially.
Make a general request for the patient to contact the clinic without sounding as if something wrong.

5 Consult and work with the patient’s primary care provider (e.g., primary care physician) to enlist his or her help in (re)engaging the patient in treatment and follow-up with the care manager

We would recommend maybe three telephone &/or clinic appointment contacts before sending a letter. After the letter, we would not recommend any additional attempts to contact patient. Perhaps the patient will contact you or the PCP can help you reconnect at a future time.