Call Guidelines for Preclinical Students Checking in with Patients

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# Be sure to:

* State role and limitations
* Confirm you have called the correct patient (DOB, full name)
* Ask the following questions or variations of, these are minimums, additional questions can be asked too:
  + *How are you doing?*
    - *[optional follow up] How are you feeling today and over the last few days?*
    - Track COVID/respiratory vs other symptoms
  + *As this is a challenging time for everyone right now, how are you feeling emotionally?*
    - *[optional follow up] What have you been thinking about COVID and your situation?*
  + *Do you have enough of your medications, and do you anticipate refill needs in the next 2 weeks?*
  + *Do you have enough food at home and are you able to get groceries or meals safely right now?*
  + *Are there any things we need to let your provider know today?*
* Additional questions, depending on patient history and time:
  + *If you have caregivers, are they still coming to see you, or are you worried about not having enough help?*
  + *Do you have all of your medical supplies (incontinence supplies, oxygen, wound supplies)?*
  + *How have you been spending your time?*
  + *What are your coping/self-care techniques?*
* Consider screening the patient for psychological distress, anxiety, or depression if needed:
  + Kessler psychological distress scale: <https://www.tac.vic.gov.au/files-to-move/media/upload/k10_english.pdf>
  + GAD-7 Anxiety, and PHQ-9 Depression screens: <https://www.torbayandsouthdevon.nhs.uk/uploads/score-sheet-gad-7-anxiety-and-phq-9-depression.pdf>
* You can use the resources here to help guide difficult conversations: [https://docs.google.com/document/d/1uSh0FeYdkGgHsZqem552iC0KmXIgaGKohl7SoeY2UXQ/preview#heading=h.4yygt6qnsp0](https://docs.google.com/document/d/1uSh0FeYdkGgHsZqem552iC0KmXIgaGKohl7SoeY2UXQ/preview%23heading=h.4yygt6qnsp0)
* Confirm follow-up time frame as determined by physician-student dyad
* Contact your attending ASAP via text/phone call if patient with any of the following:
  + Concern for suicidal/homicidal ideation
  + Fever (over 101), cough, SOB, malaise, sore throat (concern for COVID19)
  + Stroke symptoms (slurred speech, facial drooping or extremity weakness)
  + Bleeding
  + Allergic reaction to a medication or food
  + Blood sugar > 400 or < 60
  + Jaundice
  + Seizures
  + Difficulty walking
  + Confusion
  + Sudden severe pain anywhere in the body
  + Fainting or loss of consciousness
  + Eye pain or sudden onset vision changes
  + Severe headache or neck pain
  + Head or spine injury
  + Coughing up or vomiting blood
  + Chest Pain
  + Heartbeat that is fast or irregular
  + Severe abdominal pain or pressure
  + Severe or persistent vomiting or diarrhea
  + Difficulty urinating
  + Vaginal bleeding or cramping in a pregnant lady
  + New onset rash that looks like a blister or pimple
  + Leg swelling or pain, one or both legs
  + Anything at all that you feel needs urgent attention
* Update your excel sheet
* Update call log (make sure safe for PHI), per template
* Chart on Epic

# Pearls and Tips:

* Don’t promise things you cannot deliver on
* When in doubt, recognize your limitations and defer medical judgment back to attending
* When scheduling follow-up call, ensure best time of day
* Speak slowly
* Follow HIPAA guidelines when calling patient and discussing patient with attending subsequently
* Make sure to take care of yourself, debrief with attending as needed

# Examples of suggested language:

Hi, my name is X and I am a <first/second/etc>-year medical student working with <institution/clinic>. I’m calling for [Patient first name; don’t say the last name].

Is this a good time to chat?

Could you please confirm your full name and DOB for me?

Thank you, once again my name is X and I am a medical student working with Dr. X. This is a wellness call as a follow up from your visit with Dr. X to see how you are doing given the current pandemic. As a <first/second>-year medical student, I am not able to give any medical advice, but I work closely with Dr. X and I am able to relay any questions, concerns, or requests to them. Is that all ok with you?

How are you feeling today and over the last few days?

*Ask the other questions in whatever order is natural after this, record concerns in the chart. Other questions:*

*As this is a challenging time for everyone right now, how are you feeling emotionally?*

*[optional follow up] What have you been thinking about COVID and your situation?*

*Do you have enough of your medications, and do you anticipate refill needs in the next 2 weeks?*

*Do you have enough food at home and are you able to get groceries or meals safely right now?*

*If you have caregivers, are they still coming to see you, or are you worried about not having enough help?*

*Do you have all of your medical supplies (incontinence supplies, oxygen, wound supplies)?*

*How have you been spending your time?*

*What are your coping/self-care techniques?*

Are there any questions you have? If I can’t answer, I will share with our attending physician and they will get an answer to you.

<*talk with patient about their questions and record them to the chart*>

Thank you so much for making the time to talk with me today [name], I will follow up with Dr. X about our conversation shortly. I would like to call you again to follow in [time frame, e.g. one week], is there any particular day or time you prefer?

If you have any other questions, please call the clinic or send your primary care doctor a message through MyHealth.

Thank you, good-bye!

# If they don’t answer

Record the call in the EHR as a missed call and leave the following voicemail:

“This is X a medical student working with Dr. Y at <institution/clinic> calling to check in with Z. This is just a Wellness Check to see how you are doing. I’ll call back at <specific time>, hope to catch you then.”