Care team call script – Back & Neck HRA

This script is part of Unlock Health's care team script library, created to give care teams a consistent, compassionate framework for follow-up calls. Each script aligns with the corresponding HRA's clinical review and risk pathways, helping teams confidently guide participants toward the right next step.

These scripts are designed to be used **alongside your Engagement Queue CTA strategy**. For a full overview of how engagement queue CTAs work — including setup, SLAs, and best practices — see the *Call Engagement Queue CTA Playbook*.

Purpose

The Back & Neck HRA evaluates spine pain and function using the validated Pain Disability Index (PDI) framework. Participants see their overall impairment category in the risk report. The HRA also screens for urgent red-flag symptoms that may indicate serious conditions such as heart attack, meningitis, or spinal damage.

Results help care teams recommend:

- Immediate emergency evaluation for red-flag symptoms
- Specialist or orthopedic referral for severe or moderate impairment
- Primary care visits for mild impairment
- Lifestyle and prevention guidance for no impairment but risk factors present

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Pre-call checklist

Before calling, care teams can open the participant's risk report from the **Actions** column of the engagement queue dashboard. This provides context beyond the summary view.

Within the report, review:

- Primary result (for example: seek immediate medical attention, severe spine impairment, moderate spine impairment, mild spine impairment, no spine impairment)
- Overall impairment category (severity of pain interference with daily activities)
- Red-flag symptoms (for example: incontinence, chest pain, fever with headache, neurological issues)
- Lifestyle risk factors (tobacco use, obesity, lack of exercise)

Combine this report review with a quick EMR lookup, if available, to ensure the call is informed, compassionate, and action-oriented.

Additional resources

- *Clinical Review Document – Back & Neck HRA*
- *Follow-up Strategy Guide – Back & Neck HRA*
- *Sample Back & Neck HRA Report*
- *Logging Follow-up Calls with Engagement Queue CTAs*

CARE call flow

C – Connect

- “Hello, this is [Name] from [Health System]. Thank you for completing the Back & Neck Health Risk Assessment. Who do I have the pleasure of speaking with today?”
- Verify identity using date of birth or another approved identifier.

A – Assess

- “I’d like to review your results with you. Based on your responses, here’s what we found…”
- Highlight any urgent red-flag symptoms, impairment category, or lifestyle gaps. Then ask: “Can you tell me how this pain impacts your daily life?”

R – Recommend (based on impairment category)

- **Seek immediate medical attention (red-flag symptoms)** → “Your symptoms may indicate something serious. Please seek care immediately. Can I help direct you to the nearest emergency or urgent care?”
- **Severe spine impairment** → “Your results show severe impairment. We recommend an evaluation with an orthopedic surgeon or spine specialist as soon as possible. Would you like help scheduling?”
- **Moderate spine impairment** → “Your results suggest moderate impairment. We recommend consultation with an orthopedic specialist or physical therapist. Would you like assistance arranging that?”

- **Mild spine impairment** → “Your results suggest mild impairment. A primary care visit or referral to physical therapy can help manage pain and prevent worsening. Can I help you set up a visit?”
- **No spine impairment** → “You currently report no impairment, which is great. Staying active and addressing lifestyle risks such as smoking, weight, or low exercise can help protect your spine. Would you like resources or a referral to a wellness program?”

E – Enable

- Offer to schedule, transfer, or provide resources.
- “Can I help you book an appointment now?”

Documentation guidance

Log each call attempt in the engagement queue dashboard:

- Date and time of call
- Disposition — scheduled appointment, voicemail, no answer, scheduled, callback later, not eligible, referral sent, etc.
- Notes — symptoms discussed, concerns, next steps

Why documentation matters
Consistency in documentation ensures reliable reporting and continuous improvement. It also guarantees that another care team member can seamlessly continue the conversation if needed.

For detailed steps, see: *How to Log a Call in Engagement Queue*

Voicemail example

“Hello, this is [Name] from [Health System], calling regarding your recent Back & Neck Health Risk Assessment. We’d like to review your results and discuss next steps for your health. Please call us back at [Phone Number].”

Need help?

Your Client Success Director can help walk through engagement queue CTAs – from training to overall strategy.

Email: hrasupport@unlockhealthnow.com