Care team call script – Heart 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 Heart HRA calculates a participant's 10-year and 30-year cardiovascular disease (CVD) risk, as well as "Heart Age," using algorithms from the Framingham Heart Study. Results help guide care teams to recommend:

- Enrollment in chronic-care programs if high risk with existing conditions
- Cardiovascular screening or primary care follow-up if high or moderate risk
- Early intervention for lifestyle risk factors if low risk
- Diagnostic clarification when information is missing or risk is unknown

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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: high risk, moderate risk, low risk, increased due to Heart Age, unknown risk), additionally you can see the more detailed risk level within the engagement queue dashboard (such as High Risk – Existing Condition, High Risk – Near Term, High Risk – Long Term, etc.)
- Calculated Heart Age (younger, equal to, or older than actual age)
- Key risk factors (blood pressure, cholesterol, diabetes status, tobacco use, weight, physical activity, sleep)
- Family history of early cardiovascular disease

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

Additional resources

- *Clinical Review Document – Heart HRA*
- *Follow-up Strategy Guide – Heart HRA*
- *Sample Heart 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 Heart 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 concerning results, lifestyle gaps, or risk factors. Then ask:
  "Can you tell me how these factors affect your daily life or health goals?"

R – Recommend (based on risk category)

- **High risk – existing condition** (for example: diabetes, heart disease, stroke, PAD) → "Because of your existing condition, your risk is elevated. We recommend you enroll in a chronic-care management program and connect with your doctor as soon as possible. Can I help you with that today?"
- **High near-term risk** (20%+ 10-year CVD risk) → "Your near-term risk is high. We recommend cardiovascular screening, such as a stress test. Would you like help scheduling with a cardiologist?"
- **High long-term risk** (40%+ 30-year CVD risk) → "Your long-term risk is elevated. It's important to connect with a primary care provider soon. Can I help you set that up?"
- **Moderate risk** → "You're at moderate risk. Staying on top of regular primary care visits is important. Would you like help scheduling?"
- **Increased risk – due to Heart Age** → "Your Heart Age is older than your actual age, which increases your lifetime risk. Talking to your doctor about preventive steps can make a big difference. Can I help you schedule?"

- **Low risk** → "Your results show low risk, which is great. Still, regular check-ups and healthy lifestyle choices are key. Would you like resources on prevention or help scheduling a routine appointment?"
- **Unknown risk** (for example: missing blood pressure) → "We couldn't calculate your risk without a blood pressure reading. The best next step is to schedule a check-up and have your blood pressure measured. Can I help arrange that?"

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 Heart 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.

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