



Care team call script – Shoulder Elbow 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 Shoulder & Elbow HRA uses validated tools — the Oxford Shoulder Score (OSS), Oxford Shoulder Instability Score (OSIS), and Oxford Elbow Score (OES) — to assess joint pain, instability, and function.

Results help care teams recommend:

- Orthopedic surgeon referral for severe symptoms
- Orthopedic specialist or physical therapy for moderate impairment
- Primary care visits and therapy for mild impairment

Pre-call checklist

Before calling, care teams can open the participant’s risk report from the **Actions** column of the engagement queue dashboard.

Within the report, review:

- Primary result (for example: severe symptoms, moderate symptoms, mild symptoms, no significant symptoms)
- Joint location and severity (shoulder vs. elbow, function vs. instability)
- Lifestyle factors (for example: exercise habits)

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 – Shoulder & Elbow HRA](#)
 - [Follow-up Strategy Guide – Shoulder & Elbow HRA](#)
 - [Sample Shoulder & Elbow HRA Report](#)
 - [Logging Follow-up Calls with Engagement Queue CTAs](#)
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CARE call flow

C – Connect

- “Hello, this is [Name] from [Health System]. Thank you for completing the Shoulder & Elbow 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 shoulder or elbow severity, instability findings, and any lifestyle impacts. Then ask: “How has this pain or instability been affecting your daily life?”

R – Recommend (based on result category)

- **Severe symptoms** (Oxford score <20 or OSIS <20) → “Your results show severe joint impairment. We recommend a referral to an orthopedic surgeon for further evaluation. Would you like help scheduling?”
- **Moderate symptoms** (Oxford score 20–29) → “Your results suggest moderate impairment. We recommend follow-up with an orthopedic specialist or physical therapist. Can I assist with setting that up?”
- **Mild symptoms** (Oxford score 30–39) → “Your results show mild joint issues. A primary care visit or referral to physical therapy can help manage symptoms and prevent worsening. Would you like help arranging that?”
- **No significant symptoms** (Oxford score 40–48) → “You currently don’t show significant joint impairment. Maintaining healthy habits can protect your joints. Would you like resources on lifestyle changes to support joint health?”

E – Enable

- Offer to schedule, transfer, or provide resources.
 - “Can I help you set up an appointment now?”
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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 Shoulder & Elbow 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