



Care team call script – Substance Use 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 Substance Use HRA screens adults for tobacco, alcohol, and drug use behaviors using validated measures (DSM-5 Cross-Cutting Symptom Measure, WHO ASSIST, and NIDA mental health comorbidity guidance).

Results help care teams recommend:

- Immediate confidential help for participants reporting bothersome use and co-existing risk factors
- Primary care or counseling referral for participants reporting bothersome use without additional risks
- Caregiver resources when assessments are completed on behalf of someone else
- Education and monitoring for participants not currently bothered by use but at risk if behaviors change

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: get confidential help today, see a healthcare professional, learn more about treatment options, tell a healthcare provider if things change)

- Reported substances (for example: tobacco, alcohol, prescription misuse, illicit drugs)
- Behavioral indicators (for example: failed attempts to quit, concern expressed by others, treatment history, mental health conditions)
- Risk factors (for example: frequency of use, binge or heavy drinking, intravenous drug use, mental health comorbidity)

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 – Substance Use HRA](#)
- [Follow-up Strategy Guide – Substance Use HRA](#)
- [Sample Substance Use 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 Substance Use 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 reported substance use, behavioral indicators, and co-existing conditions. Then ask: “How has your use of [tobacco/alcohol/drugs] been affecting your daily life, health, or relationships?”

R – Recommend (based on result category)

- **Get confidential help today** (bothersome use plus co-existing conditions) → “Your results suggest you may benefit from immediate confidential help. We recommend connecting with a counselor or treatment provider. Would you like help scheduling?”
- **See a healthcare professional** (bothersome use, no co-existing conditions) → “You reported substance use that concerns you. Talking with your primary care provider or a counselor can help you explore options. Would you like me to help arrange that?”

- **Learn more about treatment options** (caregiver completed assessment) → “It looks like this assessment was completed on behalf of someone else. We recommend providing education and resources to help guide them to care. Would you like resources on treatment programs and caregiver support?”
- **Tell a healthcare provider if things change** (not currently bothered, no co-existing conditions) → “You didn’t report substance use that currently bothers you. If this changes in the future, it’s important to talk to a healthcare provider. Would you like resources on how to monitor and protect your health?”

E – Enable

- Offer to schedule, transfer, or provide resources.
 - “Can I help you connect to a counselor, treatment provider, or support resource today?”
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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 Substance Use 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