



Care team call script – Weight Loss 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 Weight Loss HRA evaluates BMI, quality of life impact, and weight-related comorbidities using clinical guidelines from ASMBS, IFSO, and AACE.

Results help care teams recommend:

- Bariatric surgery referral for participants meeting surgical criteria
- Primary care follow-up for those needing more information to confirm eligibility
- Weight management counseling for overweight participants with health risks
- Lifestyle support for those not recommended for weight loss but needing prevention guidance

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: possible surgery candidate, screening needed to determine eligibility, weight loss recommended, recommend “quality of life” follow-up, weight loss may be recommended, weight loss not recommended)
- BMI category and weight range (for example: obesity class, overweight, healthy weight)
- Reported comorbidities (for example: hypertension, diabetes, arthritis, sleep apnea, GERD, liver disease)
- Quality of life impacts (for example: limitations in daily activity, physical pain, emotional distress)

- Lifestyle factors (for example: tobacco use, 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 – Weight Loss HRA](#)
 - [Follow-up Strategy Guide – Weight Loss HRA](#)
 - [Sample Weight Loss 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 Weight Loss 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 BMI, comorbidities, and quality of life impacts. Then ask: “How has your weight been affecting your health or daily activities?”

R – Recommend (based on result category)

- **Possible surgery candidate** (BMI ≥ 40 , or BMI 35–39.9 with comorbidities or quality of life impact) → “Your results suggest you may be a candidate for bariatric surgery. We recommend attending a bariatric surgery seminar or scheduling an evaluation with a specialist. Would you like help with that referral?”
- **Screening needed to determine eligibility** (BMI 35–39.9 with missing data, or BMI 30–34.9 with uncontrolled diabetes) → “Some of your information is incomplete, and more evaluation is needed. We recommend you see your primary care provider for lab work and a physical exam. Would you like me to help set that up?”
- **Weight loss recommended** (overweight or class 1 obesity with comorbidities or quality of life impact) → “Your results suggest weight loss could improve your health. We recommend follow-up with primary care or a weight management program. Would you like resources or help scheduling?”

- **Recommend ‘quality of life’ follow-up** (overweight with significant quality of life impact) → “Your results show weight is affecting your quality of life. Even small improvements can help. We recommend discussing options with your doctor. Would you like me to help arrange that?”
- **Weight loss may be recommended** (overweight, no quality of life impact, missing biometrics) → “You may benefit from weight loss, but we need more information. Tracking cholesterol, blood pressure, or blood sugar will help clarify your health status. Would you like help scheduling with primary care?”
- **Weight loss not recommended** (healthy weight, underweight, or overweight with no risk factors) → “Your results show weight loss is not recommended at this time. The focus should be on maintaining your health. Would you like resources on healthy lifestyle habits?”

E – Enable

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

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 Weight Loss 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