



Care team call script – Medical 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 Medical Weight Loss HRA identifies adults who may be eligible for GLP-1 or GIP-GLP-1 and medical weight loss therapies based on BMI, health conditions, and safety factors. It combines clinical guidance from organizations such as the ADA, AACE, and Endocrine Society to determine whether medication-based weight management may be appropriate.

Results help care teams guide participants toward:

- Primary care or metabolic health evaluation for eligibility confirmation
- Specialist referral for diabetes or metabolic conditions
- Lifestyle-based weight management support when medication is not appropriate
- Education and ongoing monitoring for long-term health improvement

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 (e.g., *Likely Eligible, Possibly Eligible, Not Eligible*)
- Weight loss recommendation
- Reported health conditions and other risk factors
- Safety factors or contraindications (e.g., pancreatitis, gallbladder disease, thyroid cancer history, pregnancy, kidney/liver disease)

- Lifestyle factors (e.g., exercise habits, activity level)

If approved by your legal team, 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 – Medical Weight Loss HRA](#)
 - [Follow-up Strategy Guide – Medical Weight Loss HRA](#)
 - [Sample Medical 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 Medical Weight Loss Health Risk Assessment. Who do I have the pleasure of speaking with today?”
- Verify identity (DOB 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 their result, health conditions, and any safety considerations.
- Ask: “Can you tell me how your weight has been affecting your health or daily activities?”

R - Recommend (based on clinical pathways)

- **Likely Eligible** → “Your results suggest you may qualify for medical weight loss treatment. The next step is a clinical evaluation with a provider who can confirm eligibility and discuss options. Would you like help scheduling an appointment or attending a seminar?”
- **Possibly Eligible** → “Your results suggest you may be eligible, but more information—like lab work, history and physical or biometrics—is needed. A primary care visit is the best next step to confirm eligibility. Can I help you set that up?”
- **Not Eligible** → “Your results show that GLP-1 medications may not be the right option right now, but there are still many effective ways to support your health goals. A

provider can help you explore safe alternatives like nutrition, lifestyle programs, or other treatments. Would you like help scheduling a visit?”

E – Enable

- Offer to schedule, transfer, or provide resources.
 - “Can I help you book an appointment or connect you to our weight management or nutrition programs 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 Medical Weight Loss 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