CURRICULUM 02 / INSTRUCTOR-LED DEMONSTRATION + HANDS-ON PRACTICE

Patient Engagement & Continuity

Audience: patient navigators / care coordinators | Duration: approximately 35 minutes | Materials: fictional follow-up queue, blank action log, sample cohort report

Learning outcome: prioritize nonclinical follow-up work, document the next action, and interpret patient-continuity measures responsibly.

Module 1 · Work a follow-up queue (about 17 min)

1. **Present the problem (2 min).** "Several follow-ups are open. What should we do first so none are lost?" Explain that the exercise concerns operational follow-up, not medical triage.
2. **Teach the five-step workflow (4 min).** (a) Scan the due date; (b) check the latest action/status; (c) rank operational urgency; (d) assign a specific next action, owner and due date; (e) record completion or unresolved status. Escalate clinical questions using local policy.
3. **Model a new example (3 min).** Fictional Client D has an appointment in two business days with no confirmation recorded. Think aloud: "I check for a previous contact, send the approved reminder, record pending confirmation, and schedule a follow-up if no reply."
4. **Guided practice (4 min).** Display Client A (task due today), B (appointment tomorrow, unconfirmed), C (refill reminder 28 days away). Ask learners which is time-sensitive and why. Co-write the first action for A.
5. **Independent practice (4 min).** Learners order A–C and document a next action for each. Compare answers with the expected response on page 2; correct incomplete entries.

Module 2 · Interpret and improve outcomes (about 18 min)

1. **Explain the categories (3 min).** Continuing = currently engaged; re-engaged = returned after an interruption; new start = newly initiated. Explain that these are separate measures and must not be double-counted.
2. **Model the math (4 min).** Use fictional counts and values: 6 continuing × $200 = $1,200; 3 re-engaged × $240 = $720; 2 new starts × $180 = $360; total modeled value = $2,280.
3. **Teach the interpretation (3 min).** Say clearly: "This is a hypothetical value model, not actual reimbursement, collected revenue or profit." Ask what additional data would be needed to report realized financial impact.
4. **Guided improvement discussion (4 min).** Ask learners to connect the report to action: "What workflow change could reduce overdue follow-ups?" Model one: add a required next-action date before closing an encounter.
5. **Independent explanation + feedback (4 min).** Learners describe the three cohorts, explain the $2,280 figure, and name one improvement with a measurable outcome. Trainer checks their language and reasoning.

Video teaching focus: animated follow-up queue, think-aloud prioritization, and a short report walkthrough. Show the app only briefly as the practice tool.

CURRICULUM 02 / LEARNER PRACTICE + SCORING GUIDE

Patient Continuity Activity: What Happens Next?

All patient details are fictitious. Apply organizational policies and privacy rules; do not make clinical decisions from these records.

Record	What the follow-up queue shows	Available information
Client A	Follow-up task due today	Outreach not yet completed
Client B	Appointment tomorrow	No confirmation recorded
Client C	Refill reminder due in 28 days	Next action is blank

Follow these steps

1. Sort the queue. Rank A–C by operational urgency. State why. (2 min)

2. Check the context. Check previous contact and the approved workflow before taking action. (2 min)

3. Create a next action. For each record, log action, owner, due date and status. Mark completed only after action. (4 min)

4. Read the report. Calculate each cohort and total; explain what the groups mean. (3 min)

5. Recommend one improvement. Propose one workflow change and one measure to track it. (3 min)

Illustrative monthly cohort report

Continuing	Re-engaged	New starts	Total modeled value
6 × $200 = $1,200	3 × $240 = $720	2 × $180 = $360	$2,280

Worked answer and feedback

Expected order: A (due today), B (appointment tomorrow), C (reminder in 28 days), subject to policy. Next steps: A—authorized outreach today; B—approved reminder and confirmation check; C—schedule proactive follow-up. Log owner, due date, and actual status for each.

The cohorts are distinct; $2,280 is modeled value, NOT payment, collections or profit. Example improvement: require a next-action date; track percent of records with a complete next-action field.

Performance assessment · 8 points

Criterion	2 points: strong evidence	1 point: partial	0 points
Priority	Defensible order with reasoning	Order OR reasoning weak	No usable order
Documentation	Policy-consistent action, owner, date, status for each	Some gaps	No actionable plan
Reporting	Correct cohorts, math and explanation	One error	Cannot interpret
Responsible use	Says modeled, not actual revenue/profit; proposes measurable improvement	Only caveat OR improvement	Claims real revenue

Pass: at least 6/8 AND says $2,280 is not actual revenue. If needed, re-model and repeat on a new fictional example.