

Case Management “Elevator Speech” Development Sheet

Acknowledge/Agenda

Hello, Mrs Smith-what do you prefer I call you?
(smile, eye contact, welcoming)

You have just seen Dr Jones because you’ve been to the Emergency room for your heart. What is your understanding of his concerns and why he referred you to me?

Permission/expected time

Would it be ok if I took 10 minutes now to tell you more about that?

Describe role

My name is Jane and I am a nurse. They call me a nurse care manager and I work right here in your doctor’s office.

Relationship to provider and team

I work with Dr Jones and his care team. Some of the care team works directly with you and others work behind the scenes for you. My job is to work with you between visits with Dr Jones. That way we can address your concerns sooner and get ahead of problems.

What the patient gains from your role

You might be wondering why you would want to do this. I hope to get to know you so that together we can discover ways that will help you feel better and manage the heart failure in ways that work for you in your everyday life

The patient’s role working with you

You have a part in this too. We will work as partners. You are the expert on your life so your will be important. And I might have ideas to consider too. So you will need to be honest with me. Also agree to participate with phone calls or visits and try things out to see what works for you.

What the patient can expect

The first visit is longer so I can get to know you better and we can begin our work together. After that, contacts could be by phone, virtual or in person. They will be more frequent at first like once a week and then stretch out longer as things stabilize. All together this

often takes about 6-12 months.

Questions/Closure



What questions do you have? You don't have to decide now. You can think about it and I can call you in a few days.

Thank you for taking the time to meet with me today. Is there anything else I can do for you now? (provide contact information)