

Medical Referral Sources Chapter 1

Target: Doctors' Offices

Key Learning Skills

- Doctors' Offices Overview
- Sales Person's Role
- Key Positions Within Account
- Key Roles Within Account
- What is Important to the Referral Source
- Benefits of Referring to Home Care
- Areas of Impact for Doctors' Offices
- Benefits of Referring to Your Home Care Company
- How to Gain or Lose Business
- Key Questions
- Common Objections/Possible Responses
- Building Blocks to Developing Relationships
- Helpful Resources

Doctors' Offices Overview

Doctors' offices provide medical care by diagnosing patients' physical, mental, or emotional ailments. The doctor determines the course of treatment and attempts to educate the patients about health practices.

Doctors' offices can be great referral sources for home care services. Doctors are trusted advisors that educate and influence potential clients and their families.

Sales Person's Role

The sales person presents your home care company as the 'preferred provider' of home care. By becoming a resource to the office, the sales person demonstrates through actions and selling skills that your home care company is the best choice for patients.

Common Objections/Possible Responses

- **Objection: Our patients decide who they use when choosing home care services—not our office.**

Response 1: Determine if the individual relaying this message is the decision maker. Is there a better person to answer this question instead of a receptionist or front office assistant?

Response 2: Ask the individual to describe the general process the patient undergoes before leaving the office after the doctor's assessment. The response should give you a clear indicator of who influences the patient's referring care.

Response 3: If the office distributes a list of home care providers to the patient, ask for a copy or the opportunity to review the list.

- **Objection: We don't do home care at our office.**

Response 1: Ask: 'Help me understand your normal process. Who helps coordinate home care?'

Response 2: How often does an elderly patient call in to set multiple appointments without an 'urgent' medical need? Does the patient simply want to talk about his or her daily process? Are these calls a result of loneliness and the desire for companionship or mental stimulation?

- **Objection: Our office does not recommend home care services.**

Response 1: I understand. What do you do when a patient needs service? How do patients learn about available options within the community?

Response 2: Do you provide a list of companies in the area? May I please have a copy of the list?

Response 3: When the doctor recommends home care, who facilitates this information and helps the patient?

- **Objection: The hospital sets up home care.**

Response 1: We believe that most home care services can be designated prior to receiving care in the hospital. Do you remember a time that a doctor recommended care for an elderly patient in your office without hospitalization?

Response 2: We understand not everyone is proactive in their care and want to help in reducing the rate of elderly slips and falls by providing a safer environment for seniors, reducing hospitalization, and making your job easier. Would you like me to share how you can help provide seniors the tools they need to reduce slips and falls in their home?

Response 3: Are there families struggling to help grandma or mom with walking or coming to appointments? Do they need help?

Community Referral Sources Chapter 5

Target: Assisted Living Facilities (ALFs)

Key Learning Skills

- ALFs Overview
- Sales Person's Role
- Key Positions Within the Account
- Key Roles Within the Account
- What is Important to the Referral Source?
- What is Important to the Customer?
- Benefits of Referring to Your Home Care Company
- How to Gain or Lose Business
- Key Questions
- Common Objections/Possible Responses
- Building Blocks to Developing Relationships
- Helpful Resources for Finding Hospitals

ALFs Overview

"Assisted living is a long-term residence option that provides resident-centered care in a residential setting. It is designed for those who need extra help in their day-to-day lives, but who do not require the 24-hour skilled nursing care."

— *Assisted Living Federation of America*

ALFs are a great source of private-pay clients. The residents need help and have the financial means to rent a home or an apartment with supervision, which is your demographic. Some ALFs have personal care attendants for an additional cost, but all promote resident choice.

What is Important to the Referral Source?

- **Administrator:** The administrator is responsible for everyone in the building. You can start by learning/discussing regulations, how compliance and requirements relate to individual licensing, bonding, and insurance. Convey the impact and importance of this to you when working with them and their clients. Learning what administrators face on a daily basis will get you further in building this relationship.

In addition, the business of the ALF is targeted at retaining the residents as long as possible before they require a higher level of care, such as a long-term care facility. Home care services play an important role in keeping patients in an ALF. Home care is the perfect answer to augment what the ALF is doing by keeping residents living in their facility as long as possible.

- **Social Workers:** Social workers are trying to solve problems every day in order to make life easier for the residents. You can offer to speak to the residents and discuss their home care options. Further, social workers by nature are always concerned about money. Coupons are frequently requested.

- **Wellness Nurses (Facility Nurses):** The wellness nurses are concerned with the overall health of the residents. They know which residents are in need of more help. Find out if they are responsible for providing medication to the patients. Sometimes the distribution of medication is outsourced. The person who distributes medication (sometimes called a 'med pass' nurse), be it an internal or external staff member, is the first person to ask whether a resident requires additional assistance.

The initial assessment, which is usually completed by the wellness nurse, provides an opportunity to identify if a resident has a potential need. The wellness nurse will look for resident choice and a home care company to do activities with a resident that the staff cannot do. For example, the ALF staff cannot leave the grounds to help with residents who have needs outside their building.

- **Therapy:** Both outpatient therapy and home health therapy may be available within certain ALFs, but not all have both options and can be limited to one type. Therapy treatment can be provided either in the resident's room or in a gym. Therapists would like to have their home exercise programs carried out in between sessions to help build strength, provide additional progress in the home exercise program, and improve the patient's overall wellness.

- **Sales Persons/Sales Office:** When you approach the sales department of an ALF, approach the sales persons from the position that you are looking to be a resource for their facility if your clients decide to look for more of a community-oriented setting. You are looking to gain information for your clients as well as for yourself. Since sales persons are responsible for the sale of rooms, they will want to show you what they have to offer, and you can learn more about the facility. Ask for a tour. The more you learn, the more you will see how your home care company could fit into the facility.

Veterans Programs and Referral Sources Chapter 12

Target: Veterans Administration (VA)

Key Learning Skills

- Veterans Administration Overview
- Sales Person's Role
- Key Positions Within the Account
- Key Roles Within the Account
- What is Important to the Referral Source?
- What is Important to the Customer?
- How to Gain or Lose Business
- Programs/Access Service
- Benefits of Referring to Your Home Care Company
- Key Questions
- Common Objections/Possible Responses
- Building Blocks to Developing Relationships
- Helpful Resources

Veterans Administration Overview

VA provides care for retired US military personnel and their spouses. VA offers a number of programs, some of which involve VA contracts. Others provide funding but allow the veteran to select the provider.

Sales Person's Role

The sales person identifies opportunities within the VA system and determines how your home care company can become a 'preferred provider.'

- (Any program of interest above that you would like to target for your company)
- Becoming a contractor with the VA for home care services

Common Objections/Possible Responses

■ **Objection: You are not on the VA contract.**

Response 1: We would appreciate the opportunity to become a provider for the VA. How do we begin the process to be added to the provider list?

Response 2: Please explain how to go about this process. In addition, are there other departments that may benefit from our services?

■ **Objection: You are not GSA (contract).**

Response 1: Please explain the best way for us to access the provider list, and how we can apply to be on the list.

Response 2: What are the requirements, regulations, and process to be a GSA provider?

Insider's Note: Set up an appointment with a benefits administrator to walk you through the process, including the requirements and how to fill out the paperwork in accordance with government guidelines. Ask for the application and what needs to be done in the follow-up process. Although this is a federal program, different procedures exist in different locations. Some parts of the country may use a 'clearing house' while other parts of the country take responsibility in their own office or clinic.

Building Blocks to Developing Relationships

The VA programs can be funding sources that allow veterans and their spouses to pay for home care when it would not be financially possible out of their own pockets. Social workers and benefits administrators are a wealth of information. Become a resource to your clients by exploring the programs offered by the VA and help with that process.

Helpful Resources

- VeteranAid.org
- VetAssist.org
- VA.gov (United States Department of Veterans Affairs)