



Pre-Visit Planning for New Patients

CHC LEADERSHIP INSTITUTE LEARNING PROGRAM 2017-18

CAPSTONE TEACHBACK: JUNE 13, 2018



About Us

Transitioned from a Free Clinic to a FQHC in 2014.

We offer primary medical, dental and behavioral health services to Rockbridge County & the surrounding areas.

We recently added substance abuse counseling, family planning, prenatal care and have expanded pediatrics.

1. Focus

The focus of our project was implementing pre-visit planning to make the patient experience more meaningful.



2. Team

- Kelly Balthaser, Support Services Manager
- Tori Brown-Lipscomb, Dental Assistant
- Angela Hamilton, LPN
- Lynne Paxton, Patient Access Leader

3. Need

- Increasing patient engagement by initiating contact from the clinical team prior to the day of the visit
- Allowing for more face-to-face clinical time within the 30 minute new patient appointment with the provider
- Reducing the no-show/missed appointment rate for new patients through pre-visit planning

4. Objectives

- Plan Do Study Act
- Engage the patient before the visit to reduce the number of no-show appointments.
- Obtain records from the previous provider
- Obtain blood work so that results were in at the time of the appointment
- Implement program for pre-visit planning.

5. Assets

Our assets were

- Nursing Supervisor
- Nursing staff
- Lab assistant
- Health Information Coordinator
- Agency for Healthcare Research and Quality TeamStepps Program
- The patients



6. Action Strategies

Our action strategies:

- Staff training on objectives of the pre-visit planning
- Add a series of questions about the visit experience to
Patient Satisfaction Survey
- Develop spreadsheet for tracking and questionnaire to use in
pre-visit interview

Pre-visit Interview Questions

Medications

Medical history

Previous surgeries

Alcohol/drug use

Preventive screenings

Family history

Last Dental Visit

Known allergies

Past hospitalizations

Others in care team

Tobacco use

7. Team Development

Team Development Activities:

- Nurses study the TeamStepps Program
- Nursing Supervisor and COO developed spreadsheet for use in calls to patients in pre-visit planning
- Train nurses in following script of pre-visit questionnaire

8. Testing & Refinement

Refined Action Strategies:

Implementing this for all providers quickly became overwhelming to nurses working with full schedules/staffing shortages.

Refined to: assign this duty to a specific nurse who doesn't work with a fulltime provider and has more open time to call patients.

9. Results to Date

Results:

To date we have had one Patient Satisfaction Survey after Pre-visit Planning was implemented- we realized we need specific wording regarding the pre-visit nurse calls on the quarterly Patient Satisfaction Surveys

9. Results to Date, Con't

	Prescheduled New Patient Visits September 2017/April 2018	No Show Count September 2017/April 2018	No Show Rate September 2017/April 2018
Provider 1	32/34	3/3	9.38%/8.82%
Provider 2	25/36	4/6	16%/16.67%
Provider 3	33/45	6/4	18.18%/8.89%
Provider 4	14/18	4/4	28.57%/22.22%
Provider 5	28/28	6/7	21.43%/25%
RAHC Total	132/196	23/28	17.42%/14.29%

10. Lessons Learned

Positive results: the decrease in no-shows is encouraging

We are better prepared and there is more patient time with provider: we've obtained records from previous PCP, pre-visit bloodwork is reviewed during visit, health history allows us to know what preventive screenings may be needed

Refine questions on Patient Satisfaction surveys; refine process

More engaging, personal experience