# **Clinic and Hospital Follow-up Call Templates Tutorial**

Part of the structure and dynamic of the Patient-Centered Medical Home is increased communication and patient-centric conversations with patients. The following issues are part of PC-MH as well:

- 1. Conducting pre-visit planning with clinician reminders.
- 2. Writing individualized care plans
- 3. Writing individualized treatment goals.
- 4. Assessing patient progress toward goals.
- 5. Reviewing medication lists with patients.
- 6. Reviewing self-monitoring results and incorporating them into the medical record at each visit.
- 7. Assessing barriers when patients have not met treatment goals.
- 8. Assessing barriers when patients have not filled, refilled or taken prescribed medications.
- 9. Following up when patients have not kept important appointments
- 10. Reviewing longitudinal representation of patient's historical or targeted clinical measurements.
- 11. Completing after-visit follow-up.

In June, 2009,the Physician Consortium for Performance Improvement (PCPI), which in part includes the ABIM Foundation, American College of Physicians, Society of Hospital Medicine and the AMA Physician Consortium, published "Care Transitions: Performance Measurement Set." (See more at Physician Consortium for Performance Improvement Care Transition Data Set Tutorial) SETMA deployed that measurement set immediately and publicly reports SETMA's performance on these measures at www.jameslhollymd.com under Public Reporting.

As part of patient-centric care, SETMA's Care Coordination Department staff places care coaching calls to selected patients seen in the clinic and to all patients who have been discharged from the hospital or from the emergency department.

### Selecting Clinic Patients for receiving follow-up care coordination calls:

Go to the GP Master Plan Template.

Immunizations Injections Present Lab Future Lab Procedures Radiology Eval & Mgmt Endocrinology Endocrinology Surgery Sutures Mas	
Endocrinology Endocrinology Surgery Sutures Mas	
micanatology micanatology	ter GP
All Infectious Nu	rsing
SETMA         Today I Reviewed:         Current and previous lab         Reviewed current medications           Unspecified         Current and previous x-rays         Reviewed OTC medications         His	tories
Acute Dx Plan He	alth
Followup Questi	onnaires
Bautias Istanual HPI	chief
Follow-up System	Review
Diet Physic	al Exam
Exercise Rad	iology
Additional Acute Assessments Follow-Up Call Scheduled Superbill Asse	ssment
Chronic Dx Re-Order Education/Instructions Plan Summary Proc	edures
Rx Sheet	
Clinic Enllow-Un Call	
Chart Note - Now	
Chart Note - Offline	ion Given
Lab Results Comments PT Prescription Physic	ician Consulted
Endocrinology Education Preceptor	
Nifty After Fifty Work Return	
Pending Referrals	
Status Priority Referral Referring Provider Date	
Archived Referrals - Do not use for new referrals Referral History	
Status Priority Referral Referring Provider	

In column three, you will find seven buttons:

- 1. **Superbill** this is no longer used, but allows you to review your association of ICD-9 Codes and CPT Codes submitted for this patient encounter. Unless you simply want to review what your billing looks like, it is unnecessary to use this function.
- 2. **Plan Summary** this aggregates all of your plan for this visit and allows you to quickly review your plan of care for this visit at a future visit.
- 3. **Rx Sheet** this allows you to create and to print a copy of the patients active medications.
- 4. **Help Desk** This explains Preventive Visits for commercial insurance carriers and how to use a 25 modifier with Medicare patients.
- 5. Clinic Follow-up Call
- 6. Hospital Follow-up Call
- 7. Chart note this allows you to create a note of the current encounter.

When you click on the "Clinic Follow-up Call" button, you will launch the following template.

		Clinic F	Follow-Up Call			Return
Number	r to Call Home Phone ( Day Phone Other	409)833-9797 () - () -	<u>Send Delayed-Deliv</u>	ery Email to Follow-Up Nu	rse	
Visit For Which This Call Is Being Made	Questions to Ask			Patient Goal This Visit		
11/07/2013 1:26 PM	General					
James L. Holly MD	How are you feeling?			How does	the patient feel?	
Next SETMA Appointment	Was everything addre	essed at your las	st visit? vour last visit?	Does the patient feel everything was add		was addressed?
	Have you recieved all	lab/procedures	results from your last visit?	j is the pattern	ant naving new sympt	1113 :
	Other			Has the pa	atient recieved their re	sults?
Chief Complaints from Visit	Medications	all of your medic	ations filled?	Was the n	atient able to fill all of t	heir medications?
	Are you taking all of y	our prescribed r	nedications?	Is the patie	ent taking all of their me	edications?
	Are you having any p	roblems/side eff	ects from your medications?	Is the patie	ent having any problem	ns/side effects?
	Appointments					
	Have you kept and/or are appointments/referrals fo	you aware of a r?	ll of your			
Acute Assessments from Visit	Other			Additional Comments		
		Eollo	w-Up Call Completed By	Actions Taken		
	Click to Document Comp	letion		Advised Patient To Come In - Made Same-Day Appointment Advised Patient To Call If Improvement Discontinues		
	Click to Send Respon	se At	11	Advised Patient To Cor	ntinue Medications	
Diet	Spoke with the patient?	○ Yes ○ No		Other		_
Exercise	If no, list person spoke	n with.				
Call Attempts	New Referrals from Visit	1	(This Visit Only)	New/Changed Medication	ns from Visit	(This Visit Only)
	Status Priority	Referral	Referring Provider	Generic Name	Brand Name	Dose
Unable to Call, Letter Sent						
	1		_			_

Across the top, you will find the following functions:

- 1. Telephone Numbers to call these will be auto-posted to this template from the patient's demographic information.
- 2. Send Delayed-E-mail to Follow-up Nurse the following details how to do this successfully

#### Details for using the "Delayed-E-mail to Follow-up Nurse"

- Launch the function by clicking on the **Send Delayed-E-mail to Follow-up Nurse** button
- Click in the box next to t "this template" from the options given (this will attach the telephone call template to the e-mail
- Click the **OK** button
- Click on the "To" button on the e-mail which was launched
- The e-mail will be automatically addressed to "follow-up Calls"
- Click on the "Send Button and the process is complete.

# Before this e-mail is sent, you must decide when you want the patient to be called, you do this by:

- Clicking on "Options" in the tool bar across the top of the screen which is displaying theemail
- Click on the "Do Not Deliver before" box (which is six boxes from the top)
- When you click on "do not deliver before," today's date will appear in the first box.
- To the right of the box with today's date, there is an arrow, clink on that arrow.
- A monthly calendar will appear
- Click on the date corresponding to the number of days you wish to delay the call from the date of the present visit, i.e., if today is the 14th and you wish to have the patient called in ten days, you will click on the 24th. (Be sure to note that calls will not be made on Saturday or Sunday so adjust your call recommendations accordingly.) Also, remember, the default time is 5:00 PM, so if you want the e-mail delivered at 6:00 AM, you will need to change the time as well as the date.
- Once you have selected a date, click the "close" button. You can now send the e-mail. It will be delivered on the date you have selected.

The Clinic Follow-up Call template is divided into three columns each of which has six functions. Column I gives the nurse performing the follow-up call a quick review of six elements of the patient's previous clinic encounter without going from template to template. Column I displays:

- 1. The date of the visit for which this call is being made
- 2. The date of the next visit to SETMA
- 3. The Chief Complaints documented during the visit for which this call is being made.
- 4. The Acute Assessments for the visit for which this call is being made.
- 5. The patient's diet
- 6. The patient's exercise

Across the bottom of the three columns, the following are displayed:

1. The date and time of three attempts to call the patient. If after the third attempt, the call is not completed, a letter will be sent to the patient, asking them to call us.

A letter will be fashioned from the data and questions on the Follow-up call template. This letter will be automatically created; it will become a part of the patient's record and a copy will be mailed to the patient.

- 2. New referrals created during the visit for which the call is being made
- 3. New medications and/or medication changes or renewals made during the visit for which the call is being made.

		Clinic F	Follow-Up Call			Return
Number	to Call   Home Phone ()   Day Phone    Other	409)833-9797 () - () -	Send Delayed-Deliv	ery Email to Follow-Up Ni	<u>ırse</u>	
Visit For Which This Call Is				Patient Goal This Visit		
Being Made	Questions to Ask			Patient Responses		(
11/07/2013 1.26 PM	General					
Sumos E. Hony mb	How are you feeling?			How does	s the patient feel?	
Next SETMA Appointment	Was everything addre	essed at your las	t visit?	Does the	patient feel everythin	g was addressed?
	Are you having new	symptoms since	your last visit?	Is the patient having new symptoms?		ptoms?
	Have you recieved al	lab/procedures	results from your last visit?	u		
	Other			Has the p	atient recieved their i	results?
Chief Complaints from Visit	Were you able to get	all of your medic	ations filled?	Was the r	natient able to fill all o	f their medications?
	Are you taking all of y	our prescribed n	nedications?	Is the pat	ient taking all of their i	medications?
	Are you having any p	roblems/side eff	ects from your medications?	Is the pati	ient having any proble	ems/side effects?
	Appointments Have you kept and/or are	you aware of a	l of your			
	appointments/referrals for	r?				
Acute Assessments from Visit	Other			Additional Comments		
		Folloy	v-Up Call Completed By	Actions Taken	ma la Mada Cama P	
	Click to Document Comp	letion		Advised Patient To Co	ome in - Made Same-L III If Improvement Disc	ay Appointment
	Click to Send Respon	se At	11	Advised Patient To Co	Intinue Medications	
Diet .	Spoke with the patient?			Other		
Diet	If no list person spoke	n with				
		, ,				
Call Attempts	New Referrals from Visit	Defend	(This Visit Only)	New/Changed Medicatio	ns from Visit	(This Visit Only)
	Status Priority	Referral	Referring Provider	Generic Name	Brand Name	Dose
2 //					1	
Unable to Call, Letter Sent						
				I		

Column 2 contains 6 functions which allow the provider to select options for which the patient is to be called.

1. General – these questions address the current condition of the patient and how that compares with how the patient felt during their recent visit.

One of the questions relates to changes in the patient's condition. If the answer is that a change has taken place and option appears which allows the follow-up nurse to document the change which has taken place. The nurse can then include this in a follow-up note to the provider.

- 2. Medications these questions address the medications prescribed for the patient
- 3. Appointments this will pull from your referrals all appointments made during your lastvisit with the patient.
- 4. Click to document completion this button for use by the nurse making the follow-up call to denote completion of the call.
- 5. Click to send response this button is for use by the nurse making the follow-up call to notify the provider of the completion of the call and to note any issues which require attention by the provider. This will go to the provider's work flow.
- 6. To whom the follow-up nurse spoke.

Column 3 contains opportunities for the follow-up caller to document the patient's responses to the

follow-up call. The 6 functions in this column will be blank unless or until the provider checks the box in column 2 which gives the follow-up caller instructions for the content of the call.

- 1. Patient responses for General Questions
- 2. Patient Responses for Medication Questions
- 3. Patient Responses for Referral and appointment questions
- 4. Box for typed in questions or information
- 5. Several Options for documenting actions taken particularly for giving the patient a "stat" appointment if they are not doing well.
- 6. New Medications, reviewed medication or changed medications from previous visit.

When three attempts have been made to contact the patient without success, and after the time and date of those three attempts have been noted, a letter to the patient is automatically created which is then mailed to the patient. The following is a sample of that letter:

November 07, 2013

Dear Chart QTest,

SETMAs desire is to support you in your efforts to maintain or to regain your health.

At your last SETMA visit, your provider, James L. Holly MD, requested that we follow up with you to address any issues you may have following your office visit.

We have attempted to call you three times but have been unable to reach you. Below are the dates and times that we have tried to reach you.

11/07/2013 at 1:32 PM 11/07/2013 at 1:32 PM 11/07/2013 at 1:32 PM

At your earliest convenience we would ask that you call us back at (409) 833-9797 and let us know how you are doing with the issues listed above. Also, please also call us back if there is anything else we can help you address.

Sincerely,

The SETMA Follow-Up Staff∞

## Care Coaching Calls to Discharges From the Hospital (In-patient or ER)

SETMA's care coordination department places a call to all patients discharged from the hospital whether from inpatient status or from the ER. This call is scheduled by the Hospital Care Team at the time that the Hospital Care Summary and the Post Hospital Plan of Care and Treatment Plan is completed. See the button outlined in green below.

Hospital Ca	Adn Adn	nission Date / /	Facility		Home
Summary	Disc	charge Date / /	Type Dischar	ge Summary	Histories
Summary	Scheduled	d Admission 🔘 Yes 🔘 No	Attending		Health
Admitting Diagnosis	Status	Discharge Diagnosis	Status <u>Re-order</u>	Discharging To	System Review
					Physical Exam
				Discharge Condition	Procedures
				Prognosis	Radiology
					EKG
				Readmission Risk	Laboratory
				Low	Hydration
Additional Admitting Dx		Diselana ida Ola	Additional Discharge Dx	Discharge Time	Nutrition
		Discharge into Chro	nic List	O > 31 minutes	Hospital Course
Admitting Chronic Conditio	ns	Discharge Chronic Condit	tions <u>Re-order</u>	Prison Inmate	Nursing Home
				🔿 Yes 🔿 No	Follow-up Instr
				Days in ICU	Follow-up Loc
				Days on IV Antibiotics	Document
				Dava aa Maatilataa	Follow-Up Doc
				Days on ventilator	
				Fall Risk Assessment	
				Functional Assessment	11
				Pain Assessment	11
				Karnofsky/Lansky Scale	11
				Palliative Perf Scale	11
				Last Hospital Discharge	11
				Hospital Follow-Up Call	
				corgonico milo citaj	
			ĺ		11
Coro Transilion Audia	]	Follow-Up Exceptions			
Post Hospital Datiant Audit		Patient To Follow-Up With	Non-SETMA Provider		
Post-nospital Patient Addit	]	Patient Ok To Follow-Up >	⊳6 Days		

- You will find the button entitled "Hospital Follow-up Call" in the third column at the bottom of the Master Hospital Care Summary and Post Hospital Plan of Care and Treatment Plan screen. See above..
- You will also find the Hospital Follow-up Call Template on the Master GP Plan Template under the Clinic Follow-up Call button in the third column. This will allow the Hospital Follow-up Call template to be used for those patients seen in the ER.

PDM NURSE HISTORIES HEALTH Q	UIZES HPI ROS P.E.	X-RAY ASSESS <u>PLAN</u> PRO	CS Home
Immunizations Injections Present Lab Fu	iture Lab Procedures	Radiology Eval & Mgmt	
Endocrinology Er Rheumatology Ri	idocrinology Surgery	Sutures	Master GP
All Infectious			Nursing
Unspecified I Curre	ent and previous lab ent and previous x-rays	Reviewed current medication	Histories
Acute Dx	Plan	A	Health
		Followup	Questionnaires
		Poutine Interval	HPI chief
		Follow-up	System Review
		Diet	Physical Exam
	i	Exercise	Radiology
Additional Acute Assessments	Follow-Up Call Schedu	lled Superbi	Assessment
Chronic Dx <u>Re-Order</u>	Education/Instructions	Plan Summ	Procedures
		Rx Shee	et
<u> </u>		Clinic College	
		Hospital Follow	-Up Call
		Chart Hole	now in formation Circan
	I	Chart Note -	Offline
	Lab Results	Comments PT Preso	Physician Consulted
	Endocrinology	Education Prece	Doc
		Nifty After Fifty Work R	eturn
	Pending Referrals		
	Status Priority	Referral Referring	Provider Date
·	Archived Referrals - Do	o not use for new referrals	eterrai History
	Status Priority	Referri Referri	ng Provider
· · · · · · · · · · · · · · · · · · ·			
			•

The Hospital Follow-up Call template works exactly like the Clinic Follow-up Call except that the first column has different information. It displays:

- Admission Date
- Discharge Date
- When Patient is instructed to be followed up in the clinic
- Provider with whom the patient is to follow-up
- Hospice
- Home Health
- Discharge Diagnoses
- Diet
- Exercise

All other functions work the same, except in the second column there is a heading entitled Appointments. This information is pulled from the follow-up instructions given in the Discharge Summary. It allows the follow-up nurse to remind the patient by whom and when they are to be seen.

		Hospita	I Disc	harge Follow-	Up Call	Return		
1	Number to Call 🗌 Ho 📃 Da 🗌 Oti	me Phone (409)8 y Phone () her ()	33-9797 - -	<u>Send Delayed-Deli</u>	ivery Email to Follow-Up Nurse			
	Questions to	Ask			Patient Responses	1		
Admit Date / / / Discharge Date / / / Setting © ER © In Patient Hospice Home Health	General How ar Are you Have you Other Medications	e you feeling? u having new sympt ou obtained all DME f	oms since h that you we	nospital stay? ere prescribed?	How does the patient feel? Is the patient having new symptoms? Has the patient obtained all prescribed DME?			
Discharge Diagnosses	<ul> <li>✓ Were y</li> <li>✓ Are you</li> <li>✓ Are you</li> </ul>	ou able to get all of y u taking all of your p u having any probler	our medica rescribed m ns/side effe	itions filled? edications? ects from your medications	Is the patient able to fill all of their medications? Is the patient taking all of their medications? Is the patient having any problems/side effects			
	Appointmen Have you k	ts ept or are you awar	re of your a on / on / on /	ppointment(s) with? / /	Has the patient kept and/or aware of all scheduled appointments or referrals?			
	Additional Cor	Additional Comments						
		HCAHPS I	Patient Audi	t1	Actions Taken	Day Appointment		
Diet Exercise	Click to D Click to	ocument Completion Send Response		/-Up Call Completed By	Advised Patient To Call If Improvement Dis Advised Patient To Continue Medications Other	continues		
Call Attempts           1         / /           2         / /	Spoke wi	h the patient? One store w	/es O No ith.		Follow-Up Details From Hospital Staff Patient Ok To Follow-Up > 6 Days Patient To Follow-Up With Non-SETMA Pro	vider		
Unable to Call, Letter Sent					Patient Education Discussed       Disease Process     Other       Medications			
	New Referral Status	Priority Pefe	erral	(This Visit Only) Referring Provider	Generic Name Brand Name	(This Visit Only)		

November 07, 2013

Dear Chart QTest,

SETMAs desire is to support you in your efforts to maintain or to regain your health.

At your last SETMA visit, your provider, James L. Holly MD, requested that we follow up with you to address any issues you may have following your hospitalization.

We have attempted to call you three times but have been unable to reach you. Below are the dates and times that we have tried to reach you.

11/01/2013 at 01:32 PM 11/03/2013 at 11:15 PM 11/04/2013 at 03:15 PM

At your earliest convenience we would ask that you call us back at (409) 833-9797 and let us know how you are doing with the issues listed above. Also, please also call us back if there is anything else we can help you address.

Sincerely,

The SETMA Follow-Up Staffa

### Hospital Consumer Assessment of Healthcare Provider and Systems

One additional function is launched from the Hospital Discharge Follow-up Call template. On the template below it is outlined in green and is entitled "HCAHPS Patient Audit." HCAHPS stands for Hospital Consumer Assessment of Healthcare Provider and Systems.

		Hospital Dis	charge Follow-	-Up Call	Return					
	Number to Call 🗌 Ho 🗍 Da 🗍 Ot	me Phone (409)833-9797 y Phone () - her () -	Send Delayed-De	livery Email to Follow-Up Nurse						
	Questions to	Ask		Patient Responses						
Admit Date / / / Discharge Date / / Setting C ER C In Patient	General How a Are yo Have y Other	re you feeling? u having new symptoms sind rou obtained all DME that you	ce hospital stay? were prescribed?	How does the patient feel Is the patient having new s Has the patient obtained a	} symptoms? Il prescribed DME?					
Home Health Discharge Diagnosses	Medications Were y Are yo Are yo	; rou able to get all of your mec u taking all of your prescribe u having any problems/side (	lications filled? d medications? effects from your medications	Was the patient able to fill Us the patient taking all of the patient taking all of the patient having any p	all of their medications? neir medications? roblems/side effects?					
	Appointmer Have you I	nts kept or are you aware of you on on on	r appointment(s) with?	Has the patient kept and/o scheduled appointments o	r aware of all r referrals?					
	Additional Cor	Additional Comments								
Diet Everciee		HCAHPS Patient A	udit Iow-Up Call Completed By	Actions Taken Advised Patient To Come In - Made Sa Advised Patient To Call If Improvement Advised Patient To Continue Medication	ne-Day Appointment Discontinues ns					
		At	11	Other						
	Spoke wi	th the patient? O Yes O I list person spoken with.	No	Follow-Up Details From Hospital Staff Patient Ok To Follow-Up > 6 Days Patient To Follow-Up With Non-SETMA	Provider					
Unable to Call, Letter Sent				Patient Education Discussed         Disease Process       Other         Medications						
	New Referral	s from Visit	(This Visit Only)	New/Changed Medications from Visit	(This Visit Only)					
	Status	Priority Referral	Referring Provider	Generic Name Brand Name	Dose					

When launched this button deploys the following template. This HCAHPS Patient Audit template is used by SETMA's Care Coordination Department during the Hospital Discharge Care Coaching Call to assess SETMA's providers performance on the patient-centered care issues which are measured by the hospital. SETMA's assessment of this is used for training and accountability purposes and for improving patientcentric care.

The HCAHPS template below lists the questions which measure the standards by which provider performance is assessed.

HCAHPS Patient Audit (Hospital Consumer Assessment of Healthcare Providers and Systems)	Return
Did your physician and his/her team explain your care plan to you? 🛛 🔿 Yes 🔘 No	Send Results
Did your physician and his/her team answer all of your questions? C Yes C No	
Did your physician and his/her team listen to your questions or comments without interrupting you? C Yes C No	
Did anyone (doctors, nurses or other hospital staff) ask if you have the help you will need at home once you leave the hospital?	O Yes O No
Did your physician give you in writing the symptoms which would make you need to return to the hospital or get immediate help? Did they explain this in a way you understood?	○Yes ○No ○Yes ○No
During this hospital stay, how often did SETMA's doctors treat you with courtesy and respect? C Always C Sometimes C	Not At All
Patient Comments	
Unable to Complete	patient

Additional information can be found on SETMA's use of HCAPHS on SETMA's website at <u>http://www.jameslhollymd.com/epm-tools/SETMAs-Internal-HCAHPS-Survey-Tutorial</u> and at the following links:

- 1. <u>SETMA's approach to fulfilling the HCAHPS: Steps of action and SETMA's Video of our Care</u> <u>Transitions Process</u>
- 2. July 17, 2013 First Day of the HCAHPS Plan by SETMA
- 3. <u>The Relationship between convenience satisfaction and quality in HCAHPS</u>
- 4. Improving HCAHPS Scores for SETMA A Disgusting Event and SETMA's Plan
  - a. <u>Improving HCAHPS Scores for SETMA A Disgusting Event and SETMA's Plan Rick</u> <u>Bryant's Response</u>
  - b. <u>Response to SETMA's HCAHPS Program from SETMA's Director of Operations</u>
  - c. <u>Response to 2nd Day of HCAHPS Project Joseph Bujak Trained in an Olserian Tradition</u>
  - d. <u>Improving HCAHPS Scores for SETMA A Disgusting Event and SETMA's Plan -</u> <u>Carolyn Holly's Response</u>
- 5. <u>HCAHPS on weekend call July 20, 2013</u>
  - a. <u>HCAHPS on weekend call July 20, 2013 Joseph Bujak's Response</u>
  - b. July 23, 2013 Response to Joseph Bujak Shift Work, Shift Hospitalist, Team Hospitalist, Hospital Care Summary and Post Hospital Plan of Care and Treatment Plan
- 6. <u>Hospital Consumer Assessment of Healthcare Providers and Systems (HCAHPS): Tutorial for</u> <u>SETMA's Internal HCAHPS Survey</u>
- 7. July 30, 2013 First Iteration of the COGNOS CHAHPS Audit
- 8. <u>SETMA's Internal HCAHPS Audit for the month of August</u>