

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.

The screenshot shows a medical software interface with a top navigation bar containing tabs: PDM, NURSE, HISTORIES, HEALTH, QUIZES, HPI, ROS, P.E., X-RAY, ASSESS, PLAN, and PROCS. Below this, there are sub-tabs for Immunizations, Injections, Present Lab, Future Lab, Procedures, Radiology, and Eval & Mgmt. The 'PLAN' tab is currently selected. On the left, there are checkboxes for 'All', 'SETMA', and 'Unspecified', along with a 'Today I Reviewed' section. The main area contains several input fields for 'Acute Dx', 'Plan', 'Acute Care Followup', 'Routine Interval Follow-up', 'Diet', and 'Exercise'. There are also buttons for 'Superbill', 'Plan Summary', 'Rx Sheet', 'Help Desk', 'Clinic Follow-Up Call' (highlighted with a green box), 'Hospital Follow-Up Call', 'Chart Note - Now', and 'Chart Note - Offline'. On the right, there is a 'Master GP' section with buttons for 'Nursing', 'Histories', 'Health', 'Questionnaires', 'HPI chief', 'System Review', 'Physical Exam', 'Radiology', 'Assessment', and 'Procedures'. At the bottom, there are sections for 'Lab Results', 'Pending Referrals', and 'Archived Referrals'.

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 Follow-Up Call				Return																
Number to Call <input type="checkbox"/> Home Phone (409)833-9797 <input type="checkbox"/> Day Phone () - <input type="checkbox"/> Other () -		Send Delayed-Delivery Email to Follow-Up Nurse																		
Visit For Which This Call Is Being Made <table border="1"> <tr> <td>11/07/2013</td> <td>1:26 PM</td> </tr> <tr> <td colspan="2">James L. Holly MD</td> </tr> </table>		11/07/2013	1:26 PM	James L. Holly MD		Patient Goal This Visit <input type="text"/>														
11/07/2013	1:26 PM																			
James L. Holly MD																				
Next SETMA Appointment <table border="1"> <tr> <td>/ /</td> <td>:</td> </tr> </table>		/ /	:	Patient Responses																
/ /	:																			
Chief Complaints from Visit <table border="1"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									Questions to Ask											
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Diet <input type="text"/> Exercise <input type="text"/>		Medications <input checked="" type="checkbox"/> Were you able to get all of your medications filled? <input checked="" type="checkbox"/> Are you taking all of your prescribed medications? <input checked="" type="checkbox"/> Are you having any problems/side effects from your medications? Other <input type="text"/>																		
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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 the e-mail
- 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, click 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.

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,

SETMA's 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.

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.

Hospital Discharge Follow-Up Call				Return																												
Number to Call <input type="checkbox"/> Home Phone (409)833-9797 <input type="checkbox"/> Day Phone () - <input type="checkbox"/> Other () -		Send Delayed-Delivery Email to Follow-Up Nurse																														
Questions to Ask		Patient Responses																														
General <input checked="" type="checkbox"/> How are you feeling? <input checked="" type="checkbox"/> Are you having new symptoms since hospital stay? <input checked="" type="checkbox"/> Have you obtained all DME that you were prescribed? Other _____		<input type="text"/> How does the patient feel? <input type="text"/> Is the patient having new symptoms? <input type="text"/> Has the patient obtained all prescribed DME?																														
Medications <input checked="" type="checkbox"/> Were you able to get all of your medications filled? <input checked="" type="checkbox"/> Are you taking all of your prescribed medications? <input checked="" type="checkbox"/> Are you having any problems/side effects from your medications?		<input type="text"/> Was the patient able to fill all of their medications? <input type="text"/> Is the patient taking all of their medications? <input type="text"/> Is the patient having any problems/side effects?																														
Appointments Have you kept or are you aware of your appointment(s) with...? <input type="text"/> on <input type="text"/> / <input type="text"/> / <input type="text"/> <input type="text"/> on <input type="text"/> / <input type="text"/> / <input type="text"/> <input type="text"/> on <input type="text"/> / <input type="text"/> / <input type="text"/>		<input type="text"/> Has the patient kept and/or aware of all scheduled appointments or referrals?																														
Additional Comments <div style="border: 1px solid black; height: 40px;"></div>																																
<div>HCAHPS Patient Audit</div>																																
Discharge Diagnoses <div style="border: 1px solid black; height: 100px;"></div>		Actions Taken <input type="checkbox"/> Advised Patient To Come In - Made Same-Day Appointment <input type="checkbox"/> Advised Patient To Call If Improvement Discontinues <input type="checkbox"/> Advised Patient To Continue Medications Other <input type="text"/>																														
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Diet <input type="text"/> Exercise <input type="text"/>		Follow-Up Call Completed By <input type="text"/> At <input type="text"/> / <input type="text"/> / <input type="text"/> Spoke with the patient? <input type="radio"/> Yes <input type="radio"/> No If no, list person spoken with. <input type="text"/>																														
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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 Staff^{ca}

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 Discharge Follow-Up Call

[Return](#)

Number to Call ☐ Home Phone (409)833-9797
☐ Day Phone () -
☐ Other () -

Send Delayed-Delivery Email to Follow-Up Nurse

Questions to Ask

General

☒ How are you feeling?

☒ Are you having new symptoms since hospital stay?

☒ Have you obtained all DME that you were prescribed?

Other _____

Medications

☒ Were you able to get all of your medications filled?

☒ Are you taking all of your prescribed medications?

☒ Are you having any problems/side effects from your medications?

Appointments

Have you kept or are you aware of your appointment(s) with...?

_____ on ____ / ____ / ____

_____ on ____ / ____ / ____

_____ on ____ / ____ / ____

Additional Comments

HCAHPS Patient Audit

Patient Responses

_____ How does the patient feel?

_____ Is the patient having new symptoms?

_____ Has the patient obtained all prescribed DME?

_____ Was 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?

_____ Has the patient kept and/or aware of all scheduled appointments or referrals?

Admit Date ____ / ____ / ____

Discharge Date ____ / ____ / ____

Setting ☐ ER ☐ In Patient

Hospice _____

Home Health _____

Discharge Diagnoses

Diet _____

Exercise _____

Call Attempts

☐ 1 ____ / ____ / ____

☐ 2 ____ / ____ / ____

☐ 3 ____ / ____ / ____

☐ Unable to Call, Letter Sent
____ / ____ / ____

Actions Taken

☐ Advised Patient To Come In - Made Same-Day Appointment

☐ Advised Patient To Call If Improvement Discontinues

☐ Advised Patient To Continue Medications

Other _____

Follow-Up Details From Hospital Staff

☐ Patient Ok To Follow-Up > 6 Days

☐ Patient To Follow-Up With Non-SETMA Provider

Patient Education Discussed

☐ Disease Process Other _____

☐ Medications _____

☐ Symptom Self Care _____

New Referrals from Visit (This Visit Only)

Status	Priority	Referral	Referring Provider

New/Changed Medications from Visit (This Visit Only)

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 patient-centric 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](#)

[Send Results](#)

Did your physician and his/her team explain your care plan to you? ☐ Yes ☐ No

Did your physician and his/her team answer all of your questions? ☐ Yes ☐ No

Did your physician and his/her team listen to your questions or comments without interrupting you? ☐ Yes ☐ 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? ☐ Yes ☐ No

Did your physician give you in writing the symptoms which would make you need to return to the hospital or get immediate help? ☐ Yes ☐ No

Did they explain this in a way you understood? ☐ Yes ☐ No

During this hospital stay, how often did SETMA's doctors treat you with courtesy and respect? ☐ Always ☐ Sometimes ☐ Not At All

Patient Comments

Unable to Complete

☐ Prison Inmate ☐ Patient Refused ☐ Nursing Home/Rehab ☐ No Contact/Incorrect Information ☐ Not Discharged/Still Inpatient

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

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