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 Rheumatology Rheumatology	
Mas	
modifiatology mounatology	ter GP
	rsing
SETMA Today I Reviewed: Current and previous lab Reviewed current medications Unspecified Current and previous x-rays Reviewed OTC medications Hist	tories
	ealth
Acute Care Questi	onnaires
Routine Interval HPI	chief
	n Review
Diet Physic	al Exam
	liology
Additional Acute Assessments Follow-Up Call Scheduled Superbill Asse	ssment
Chronic Dx Re-Order Education/Instructions Plan Summary Proc	edures
Rx Sheet	
Clinic Follow-Up Call	
Chart Note - Now	
Chart Note - Offline	tion Given
Lab Results Comments PT Prescription Physic	ician Consulted
Endocrinology Education Preceptor Med-Legal Return Doc	
Nifty After Fifty Work Return	
Pending Referrals	
Status Priority Referral Referring Provider Dates	
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
Numbe	r to Call Alone Phone Call Day Phone Call Call Call Call Call Call Call Cal	409)833-9797 () - () -	Send Delayed-Deliv	very Email to Follow-Up Nu	irse	
Visit For Which This Call Is Being Made	Questions to Ask			Patient Goal This Visit Patient Responses		-
11/07/2013 1:26 PM	General			Patient Responses		
James L. Holly MD	How are you feeling?			How does	the patient feel?	
Next SETMA Appointment	Was everything addre				patient feel everything	
11 :	Are you having new s		your last visit? results from your last visit?	Is the patie	ent having new sympt	oms?
	Other	abiprocedures	readita from your last visit:	Has the pa	atient recieved their re	sults?
Chief Complaints from Visit	Medications					
	 Were you able to get a Are you taking all of y 	-		·	atient able to fill all of t ent taking all of their m	
			ects from your medications?		ent having any probler	
	Annointmente					
Appointments Have you kept and/or are you aware of all of your						
	appointments/referrals for	r?				
Acute Assessments from Visit				Additional Comments		
	011 22					
	Other			Actions Taken		
	Click to Document Compl		w-Up Call Completed By	Actions Taken Advised Patient To Cor	me in - Made Same-Da	y Appointment
	Click to Send Respons		11	Advised Patient To Cal	•	ntinues
	Cooke with the estimate	0 Yes 0 H		Other	nunue medications	
Diet Exercise	Spoke with the patient? If no, list person spoker					
	New Referrals from Visit		(This Visit Only)	New/Changed Medication	e from Vieit	(This Visit Only)
Call Attempts	Status Priority	Referral	Referring Provider	Generic Name	Brand Name	Dose
3 //						
Unable to Call, Letter Sent						
11	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		
	Questions to Ask			Patient Responses		(
11/07/2013 1:26 PM James L. Holly MD	General					
Sumos E. Hony mb	How are you feeling?			How does	s the patient feel?	
Next SETMA Appointment	Was everything addr	-			patient feel everythin	-
	Are you having new			Is the pati	ient having new symp	ptoms?
		lab/procedures	results from your last visit?	u		
	Other			Has the p	atient recieved their i	results?
Chief Complaints from Visit	Medications Were you able to get	all of your medic	ations filled?	Was the r	patient able to fill all o	f their medications?
	Are you taking all of y	-		· · · ·	ient taking all of their i	
			ects from your medications?		ient having any proble	
	Appointments Have you kept and/or are	you aware of a	l of your			
	appointments/referrals for					
Acute Assessments from Visit	Other			Additional Comments		
		Folloy	v-Up Call Completed By	Actions Taken		
L	Click to Document Comp			Advised Patient To Co Advised Patient To Ca		
	Click to Send Respon	se At	11	Advised Patient To Co		Jonando S
P: (Spoke with the patient?			Other		
Diet Exercise	If no, list person spoke					
	<u> </u>	, ,				
Call Attempts	New Referrals from Visit	Defend	(This Visit Only)	New/Changed Medicatio	1	(This Visit Only)
	Status Priority	Referral	Referring Provider	Generic Name	Brand Name	Dose
2 //						
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 / /		ge Summary	Histories
Summary	Schedule	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			Additional Discharge Dx	Discharge Time 1 - 31 minutes	Nutrition
		Discharge into Chro		O > 31 minutes	Hospital Course
Admitting Chronic Conditio	ns	Discharge Chronic Condit	tions <u>Re-order</u>	Prison Inmate	Nursing Home
				O 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	
				ourgoinee rine etay	
					- 11
					, i i i i i i i i i i i i i i i i i i i
	1	Follow-Up Exceptions	,		
Care Transition Audit		Patient To Follow-Up With			
Post-Hospital Patient Audit]	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 PLAN PROCS	Home
	uture Lab Procedures	Radiology Eval & Mgmt	
	ndocrinology Surgery heumatology	Sutures	Master GP
All Infectious			Nursing
SETMA Today I Reviewed: Curre	ent and previous lab ent and previous x-rays	Reviewed current medications	s Histories
Acute Dx	Plan	Acute Care	Health
		Followup	Questionnaires
		Routine Interval	HPI chief
		Follow-up	System Review
		Diet	Physical Exam
		Exercise	Radiology
Additional Acute Assessments	Follow-Up Call Schedu		Assessment
Chronic Dx Re-Order	Education/Instructions	Plan Summar	Procedures
		Rx Sheet Help Desk	
		Oficia Fallow Ha	
		Hospital Follow-U	p Call
		Chart Note - N	Information Oiven
	I	Chart Note - Of	fline
	Lab Results	Comments PT Prescrip	Privsician Consuled
í	Endocrinology	Education Precepto Med-Legal Return Do	
	Deading Defensels	Nifty After Fifty Work Retu	
	Pending Referrals Status Priority	Referral Referring Pr	ovider Dater
	- Status Phoney	Referring Pr	ovider Date
			F
·		not use for new referrals	erral History
	Status Priority	Referral Referring	
		· ·	
i			
			<u> </u>

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	y Phone ()		<u>Send Delayed-Deli</u>	ivery Email to Follow-Up Nurse	
	Questions to	Ask			Patient Responses	1
Admit Date / / / Discharge Date / / Setting C ER C In Patient Hospice Home Health	Are yo V Have y Other Medications		that you we	re prescribed?	How does the patient feel? Is the patient having new sym	escribed DME?
Discharge Diagnosses	Are yo	ou able to get all of y u taking all of your p u having any probler	rescribed m		Was the patient able to fill all of Is the patient taking all of their Is the patient taking all of patient taking all of patient taking all of patient taking all of their	medications?
	Appointmen Have you b		re of your a on / on / on /	1	Has the patient kept and/or av scheduled appointments or re	
	Additional Cor	nments				
		HCAHPS I	Patient Audi	:	Actions Taken	
Diet Exercise		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 / /		h the patient? One store w			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		erral	(This Visit Only) Referring Provider	New/Changed Medications from Visit Generic Name Brand Name	(This Visit Only) Dose

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 Staff¹²

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
1		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 Hospice	Are yo	re you feeling? u having new symptoms sinc ou obtained all DME that you		How does the patient feel? Is the patient having new s Has the patient obtained all	ymptoms?
Home Health Discharge Diagnosses	Are yo	ou able to get all of your med u taking all of your prescribed u having any problems/side e	I medications?	Was the patient able to fill a Is the patient taking all of th Is the patient having any pr	eir medications?
	Appointmer Have you I	its ept or are you aware of you on on on	r appointment(s) with?	Has the patient kept and/or scheduled appointments or	
	Additional Cor	nments			
Diet Exercise		o Send Response	ow-Up Call Completed By	Actions Taken Advised Patient To Come In - Made San Advised Patient To Call If Improvement I Advised Patient To Continue Medication Other	Discontinues
Call Attempts 1 / / 2 / / 3 / /		At the patient? Yes N ist person spoken with.	/ / lo	Other Follow-Up Details From Hospital Staff Patient Ok To Follow-Up > 6 Days Patient To Follow-Up With Non-SETMA I	Provider
Unable to Call, Letter Sent				Patient Education Discussed Disease Process Other Medications	
	New Referral	1 1	(This Visit Only)	New/Changed Medications from Visit	(This Visit Only)
	Status	Priority Referral	Referring Provider	Generic Name Brand Name	Dose
		1			

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? O Yes O 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?	C Yes C 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? O Always O Sometimes O	NotAtAll
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. Response to SETMA's HCAHPS Program from SETMA's Director of Operations
 - 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. SETMA's Internal HCAHPS Audit for the month of August