

Measure the impact of pre-visit planning

Measure the impact of pre-visit planning using the measurement tools provided below. Each is designed with a quality improvement framework that will allow you to see positive changes in your operational efficiency.

Consider (1) selecting one or two measurement tools, (2) monitoring each regularly and (3) sharing progress reports with staff during team meetings or huddles. The full benefits of implementation may not be realized until slightly over a year after implementation, when most patients have had their first visit using the new pre-visit planning process. Keep in mind that data collection can be completed by any member of the team who is involved in the improvement efforts.

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Measurement tool 1: Number of patient contacts regarding results

Step 1: Track the volume of calls and messages about laboratory test and health screening results

Purpose: This log will measure the change in the number of calls and messages (e.g., emails or faxes) associated with laboratory tests and health screenings during a clinic day before and after implementation of pre-visit planning.

Instructions: Each clinician (e.g., MD, NP or PA) in the practice can complete this tracking log at three time points: (1) at least one week before starting the new pre-visit planning process, which will serve as baseline data; (2) 12 weeks after implementation; and (3) 24 weeks after implementation. The tracking log accounts for five days. If the clinician works fewer than that or is unable to complete the tool each day, simply tally when possible.

Track the number of calls and messages that are received and returned about a laboratory or health screening result from a patient. Count each attempt to reach the patient. The shaded gray cells have been included to guide you in transferring data through this multi-step tool and determining the value of your first time point.

Clinician name:		
Clinic week:	Number of calls and messages received and returned (patient contacts)	Total # of contacts
Day 1:		
Day 2:		
Day 3:		
Day 4:		
Day 5:		
	Add daily totals to determine total number of contacts per clinic week (numerator)	
	Number of days completed per clinic week (denominator)	
	Average number of contacts by the clinician (numerator divided by denominator)	
	Data to include in Step 2 →	

Step 2: Determine practice average number of calls and messages received and returned

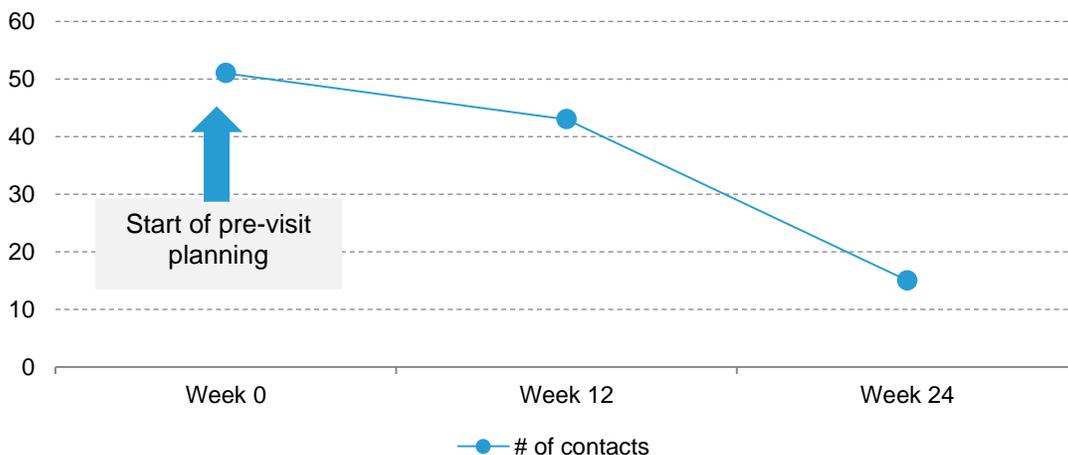
Instructions: Determine the average number of calls and messages received and returned (patient contacts) associated with laboratory tests and health screenings for all clinicians during the same week. Populate the chart below with individual clinician data calculated in Step 1. The numerator is the total number of contacts for all clinicians who submitted data from Step 1. The denominator is the total number of clinicians who submitted data from Step 1.

Participating clinicians	Week 0 (Pre-implementation)	Week 12 (Post-implementation)	Week 24 (Post-implementation)
Clinician 1:			
Clinician 2:			
Clinician 3:			
...			
Clinician 10:			
Total number of contacts for all clinicians (numerator)			
Total number of clinicians included (denominator)			
Average number of calls and messages received and returned for all clinicians in the practice (numerator divided by denominator) Data to include in Step 3 →			

Step 3: Graph your results

Instructions: Use a charting tool to graph the average number of calls and messages received and returned associated with laboratory tests and health screenings for the practice before and after implementation. Your graph might look like the run chart below. Use this to discuss how you can improve the process with your team.

Example: Average number of contacts (calls/emails) regarding results



Measurement tool 2: Clinician experience survey

Step 1: Survey clinicians

Purpose: The purpose of this survey is to measure clinician professional satisfaction and understand the clinician experience as it relates to pre-visit planning in the practice.

Instructions: Each clinician (e.g., MD, NP or PA) in the practice could complete this survey at three time points: (1) at least one week before starting the new pre-visit planning process, which will serve as baseline data; (2) 12 weeks after implementation; and (3) 24 weeks after implementation. Complete this survey to identify opportunities for performance improvement.

The shaded gray cells have been included to guide you in transferring data through this multi-step tool and determining the value of your first time point.

Clinician Survey					
Clinician name:			Date of Survey:		
Did a staff member work with you during today's clinic session to assist with documentation such as laboratory order entries or prescription processing? <input type="checkbox"/> Yes <input type="checkbox"/> No					
<i>Rate the following statements based on frequency of your experience. Please circle your answer.</i>					
1. Patient laboratory tests and health screenings are done with sufficient time for me to review the results before or at the visit.	1 Never	2 A little of the time	3 Some of the time	4 Most of the time	5 All of the time
2. All staff are preparing for the patient's visit as much as possible.	1 Never	2 A little of the time	3 Some of the time	4 Most of the time	5 All of the time
3. Before the visit takes place, I am able to exchange pertinent information about the patient with staff.	1 Never	2 A little of the time	3 Some of the time	4 Most of the time	5 All of the time
4. We are able to address preventive and chronic care needs during the visit.	1 Never	2 A little of the time	3 Some of the time	4 Most of the time	5 All of the time
5. Before I enter the exam room, I already know the purpose of my patient's visit.	1 Never	2 A little of the time	3 Some of the time	4 Most of the time	5 All of the time
6. Before I enter the exam room, I already know if there are medication issues that I need to address.	1 Never	2 A little of the time	3 Some of the time	4 Most of the time	5 All of the time
<i>Answer the following only after pre-visit planning has been implemented.</i>					
What do you like most about pre-visit planning?					

How could we improve pre-visit planning?
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Step 2: Calculate an average survey score for each clinician

Instructions: Transfer the numeric responses from the survey in Step 1 (questions 1-6) to the table below then calculate the average score for each clinician. The numerator is the sum of survey response values. The denominator is the total number of questions answered on the survey.

Open-ended questions on the survey are not included in the numeric scoring. You may wish to list all of these comments for your clinic leadership or care team to review when they look at the survey results. These could help focus continued quality improvement efforts as the team adopts the new process.

Clinician name:	Week 0 (Pre-implementation)	Week 12 (Post-implementation)	Week 24 (Post-implementation)
Question 1			
Question 2			
Question 3			
Question 4			
Question 5			
Question 6			
Add survey response values (numerator)			
Total number of questions answered (denominator)			
Determine clinician professional satisfaction score (numerator divided by denominator) Data to include in Step 3 →			

Step 3: Calculate an average survey score for all clinicians

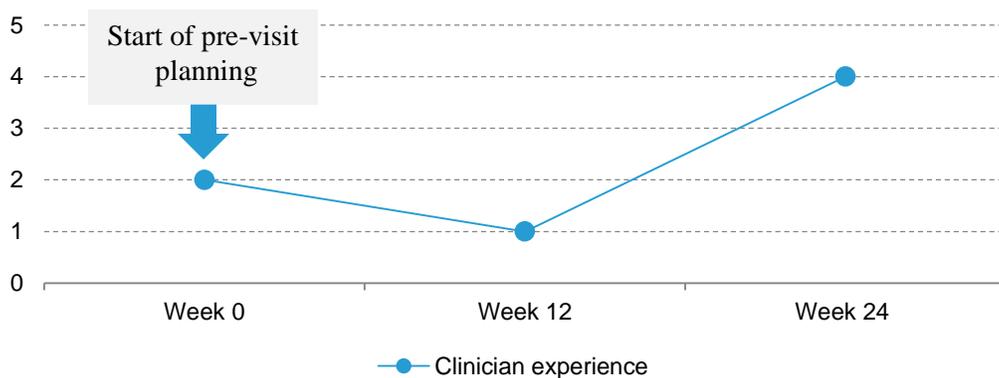
Instructions: Determine the average professional satisfaction score for all clinicians in the practice. Populate the chart below with individual clinician data calculated in Step 2. The numerator is the sum of the average scores for all submitted clinician surveys. The denominator is the total number of clinicians to complete a survey.

Participating clinicians	Week 0 (Pre-implementation)	Week 12 (Post-implementation)	Week 24 (Post-implementation)
Clinician 1:			
Clinician 2:			
Clinician 3:			
...			
Clinician 10:			
Add clinician professional satisfaction scores (numerator)			
Total number of clinicians included (denominator)			
Calculate practice professional satisfaction score (numerator divided by denominator) Data to include in Step 4 →			

Step 4: Graph your results

Instructions: Use a charting tool to graph the professional satisfaction score for your practice before and after implementation of pre-visit planning. Your graph might look like the run chart below. Use this to discuss how you can improve the process with your team.

Example: Average clinician professional satisfaction score (1-5 scale)



Measurement tool 3: Patient experience survey

Step 1: Survey your patients

Purpose: The purpose of this survey is to measure patient satisfaction and understand the patient experience as it relates to pre-visit planning in the practice.

*Instructions: Measure the patient experience before and after implementation by distributing this survey to patients at three time points: (1) at least one week before starting the new pre-visit planning process, which will serve as baseline data; (2) 12 weeks after implementation; and (3) 24 weeks after implementation. Use the same day of the week each time you distribute surveys (e.g., sample patients with Tuesday appointments). Ask a member of the team to issue the survey to every patient **after** their visit with the provider and identify a place for patients to anonymously submit completed surveys. Aim to collect 30 survey responses. Use survey results to identify opportunities for performance improvement.*

The shaded gray cells have been included to guide you in transferring data through this multi-step tool and determining the value of your first time point.

Patient Survey					
Survey number:			Date of Survey:		
During this visit, did someone stay in the exam room with you and the doctor and take notes on the computer? <input type="checkbox"/> Yes <input type="checkbox"/> No					
Do you need to have laboratory tests and health screenings done soon after this visit? <input type="checkbox"/> Yes <input type="checkbox"/> No					
<i>How much do you agree or disagree with the following statements? Please circle your answer.</i>					
1. I feel good about my visit.	1 Strongly disagree	2 Disagree	3 Neutral	4 Agree	5 Strongly agree
2. I felt that my provider (physician, NP, or PA) was prepared for my visit.	1 Strongly disagree	2 Disagree	3 Neutral	4 Agree	5 Strongly agree
3. I was able to discuss my current laboratory results with my provider at the time of the visit.	1 Strongly disagree	2 Disagree	3 Neutral	4 Agree	5 Strongly agree
4. I was able to address all of my concerns with my provider during the visit.	1 Strongly disagree	2 Disagree	3 Neutral	4 Agree	5 Strongly agree

Step 2: Calculate a satisfaction score for each patient

Instructions: Transfer the numeric responses from the survey in Step 1 (questions 1-4) to the table below then calculate the average survey score for each patient. The numerator is the sum of survey response values. The denominator is the total number of questions answered on the survey.

Survey number:	Week 0 (Pre-implementation)	Week 12 (Post-implementation)	Week 24 (Post-implementation)
Question 1			
Question 2			
Question 3			
Question 4			
Add survey response values (numerator)			
Total number of questions answered (denominator)			
Determine patient satisfaction score (numerator divided by denominator) Data to include in Step 3 →			

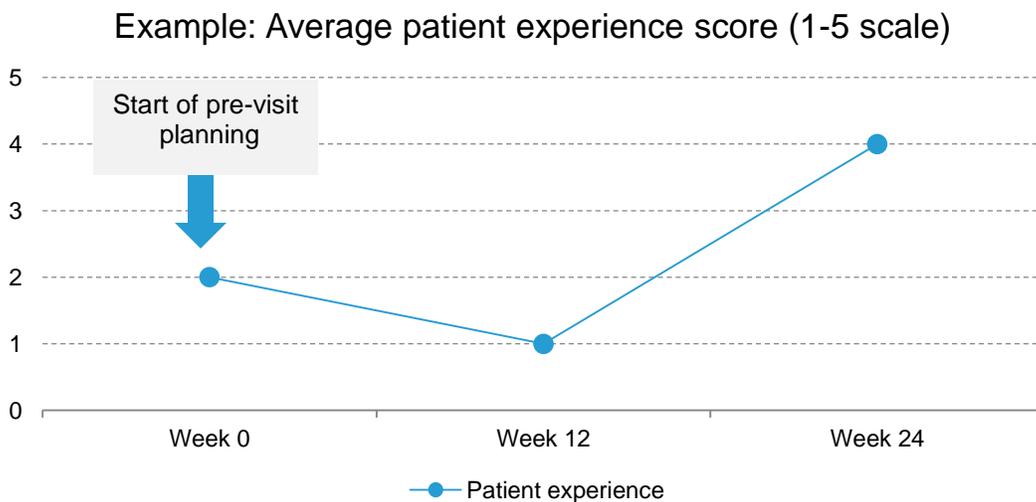
Step 3: Calculate the practice patient satisfaction score

Instructions: Determine the average satisfaction score for all patients in the practice. Populate the chart below with individual patient data calculated in Step 2. The numerator is the sum of the average scores for all submitted patient surveys. The denominator is the total number of patients to complete a survey.

Participating patients	Week 0 (Pre-implementation)	Week 12 (Post-implementation)	Week 24 (Post-implementation)
Survey number: 1			
Survey number: 2			
Survey number: 3			
...			
Survey number: 30			
Add patient satisfaction scores (numerator)			
Total number of patients included (denominator)			
Calculate practice patient satisfaction scores (numerator divided by denominator) Data to include in Step 4 →			

Step 4: Graph your results

Instructions: Use a charting tool to graph the patient satisfaction score for your practice before and after implementation of the pre-visit planning process. Your graph might look like the run chart below. Use this to discuss how you can improve the process with your team.



Measurement tool 4: Staff experience survey

Step 1: Survey your staff

Purpose: The purpose of this survey is to measure professional satisfaction and understand the staff experience as it relates to pre-visit planning.

Instructions: Each staff member in the practice should complete this survey at three time points: (1) at least one week before starting the new pre-visit planning process, which will serve as baseline data; (2) 12 weeks after implementation; and (3) 24 weeks after implementation. Complete this survey to identify opportunities for performance improvement.

The shaded gray cells have been included to guide you in transferring data through this multi-step tool and determining the value of your first time point.

Staff Survey					
Staff name (optional):			Date of Survey:		
<i>How much do you agree or disagree with the following statements? Please circle your answer.</i>					
1. I feel that the work that I do improves the quality of patient care.	1 Strongly disagree	2 Disagree	3 Neutral	4 Agree	5 Strongly agree
2. My professional skills are used to the fullest at this clinic.	1 Strongly disagree	2 Disagree	3 Neutral	4 Agree	5 Strongly agree
3. The tasks that I am asked to do each day are manageable.	1 Strongly disagree	2 Disagree	3 Neutral	4 Agree	5 Strongly agree
4. Before the visit, I am able to exchange pertinent information about the patient with providers.	1 Strongly disagree	2 Disagree	3 Neutral	4 Agree	5 Strongly agree
5. People at all levels of our clinic give feedback to improve the way we do things.	1 Strongly disagree	2 Disagree	3 Neutral	4 Agree	5 Strongly agree
<i>Answer the following only after pre-visit planning has been implemented.</i>					
What do you like most about pre-visit planning?					
How could we improve pre-visit planning?					

Step 2: Calculate the professional satisfaction score for each staff member in the practice

Instructions: Transfer the numeric responses from the survey in Step 1 (questions 1-5) to the table below then calculate the average survey score for each staff member. The numerator is the sum of survey response values. The denominator is the total number of questions answered on the survey.

Open-ended questions on the survey are not included in the numeric scoring. You may wish to list all of these comments for your clinic leadership or care team to review when they look at the survey results. These could help focus continued quality improvement efforts as the team adopts the new process.

Staff name (if provided):	Week 0 (Pre-implementation)	Week 12 (Post-implementation)	Week 24 (Post-implementation)
Question 1			
Question 2			
Question 3			
Question 4			
Question 5			
Add survey response values (numerator)			
Total number of questions answered (denominator)			
Calculate staff member professional satisfaction score (numerator divided by denominator) Data to include in Step 3 →			

Step 3: Calculate the professional satisfaction score for all staff in the practice

Instructions: Determine the average professional satisfaction score for all staff members in the practice. Populate the chart below with individual staff data calculated in Step 2. The numerator is the sum of the average scores for all submitted staff professional satisfaction surveys. The denominator is the total number of staff to complete a survey.

Participating staff	Week 0 (Pre-implementation)	Week 12 (Post-implementation)	Week 24 (Post-implementation)
Staff 1:			
Staff 2:			
Staff 3:			
...			
Staff 10:			
Add staff professional satisfaction scores (numerator)			
Total number of staff members included (denominator)			
Calculate staff professional satisfaction scores (numerator divided by denominator) Data to include in Step 4 →			

Step 4: Graph your results

Instructions: Use a charting tool to graph the professional satisfaction score for your staff before and after implementation. Your graph might look like the run chart below. Use this to discuss how you can improve the process with your team.



Additional Information

What else should you measure?

Pre-visit planning can increase productivity and capacity to care for more patients. If this is one of your goals, consider tracking your productivity visits/half day and/or relative value units (RVUs) using your practice management system. Sharing positive results is an opportunity to showcase your success.

For additional information on how to implement quality improvement strategies in your practice, contact the AMA at StepsForward@ama-assn.org.

Sources for scales

Willard-Grace R, Hessler D, Rogers E, Dube K, Bodenheimer T, Grumbach K. Team structure and culture are associated with lower burnout in primary care. *JABFM*. 2014;27:229-238.

Reuben DB, Knudsen J, Senelick W, Glazier E, Koretz BK. The Effect of a Physician Partner Program on Physician Efficiency and Patient Satisfaction. *JAMA IM*. 2014 Jul; 174(7):1190-1193.