

Pre-visit Planning Implementation Checklist

Framework for a quality improvement or MOC Part IV activity

Assess	
	<p>Identify opportunities for improvement. In reviewing this toolkit, did you see any strategies that are not currently being used in your practice that may help the team achieve more efficient and meaningful patient visits?</p>
	<p>Obtain baseline data to understand the current state. Use this module’s proposed metrics to measure an indicator that is important to the practice, such as an outcome or satisfaction measure. See metrics and data collection forms.</p>
Improve	
At the current visit	
	<p>Re-appoint the patient at the conclusion of the visit. Schedule the next follow-up appointment before the patient has left the office.</p>
	<p>Use a “visit planner” checklist to arrange the next appointment(s). The physician can indicate any interval care and associated labs to be completed before those appointments.</p>
	<p>Arrange for laboratory tests to be completed before the next visit. Place orders now for future appointments, which will save time later.</p>
Before the next visit	
	<p>Perform visit preparations. Review the interval care ordered on the visit planner. Confirm that the office has obtained all necessary results and notes. Share any abnormal results with the physician.</p>
	<p>Use a data dashboard to identify gaps in care. Identify which preventive and chronic care needs should be addressed at the upcoming visit.</p>
	<p>Send patients appointment reminders. Use an automated or manual process to send reminders via text message, email, phone call or letter.</p>
	<p>Consider a pre-visit phone call or email. A nurse or medical assistant (MA) can call complex patients to update their information and set their visit agenda before the appointment.</p>
At the next visit	
	<p>Hold a pre-clinic care team huddle. Exchange important information that may be useful during the busy clinic day.</p>
	<p>Use a pre-appointment questionnaire. Ask patients to provide valuable information that will save time in the exam room.</p>
	<p>Hand off patients to the physician. After the nurse or MA rooms the patient, he or she can briefly update the physician to help focus the physician’s portion of the visit and meet patient needs and expectations.</p>

Reassess and reinvigorate	
	<p>Measure your success using the pre-determined metrics. Use results obtained from the chosen metrics to identify what is working well and where improvement efforts should be focused. If participating in an MOC activity or a quality improvement effort, multiple improvement cycles may be undertaken.</p>
	<p>Celebrate and reinforce successes to keep the team energized and committed. Make the process fun and engage front line staff in all phases of the improvement effort.</p>

Source: AMA. *Practice transformation series: pre-visit planning*. 2015.

Contact the AMA for implementation support at StepsForward@ama-assn.org or by calling (800) 987-6630.