Pre-Visit Planning in Primary Care

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Introduction and Background
Pre-visit planning is the process of collecting and organizing data prior to a patient appointment. There are various methods to apply this approach into practice. The pre-visit planning process streamlines appointments, improves communication, increases efficacy and quality care, and assists with meeting system goals. The process involves scheduling future appointments, arranging for future lab draws, gathering necessary information from the patient, and huddling to ensure adequate handoff of patients. The result often improves patient satisfaction and saves physician time with each patient visit.

PICOT Question
In Ambulatory Care, how does pre-visit planning (as compared to no pre-visit planning) effect the completion of ambulatory preventative health maintenance questions?

Methods
• A search of Google Scholar, CINAHL, PubMed, and RocScholar using keywords was completed.
• Keywords used included “PRE VISIT PLANNING”, “SCREENING”, “PVP”, “PATIENT SATISFACTION”.
• Article abstracts were reviewed and excluded or included based on relevance to the PICOT question.

Interventions
A team member calls the patient 7 days before appointment to complete pre-visit planning, using a questionnaire form. This identifies incomplete tests, screenings, need for immunizations and outstanding referrals. During the phone call, clinical staff counsels patient about immunizations that are due and the importance of scheduling appointments with specialists as referred. They encourage patient to complete tests prior to the office visit so the results can be reviewed at the appointment.

Results
What did the data say? Consistent Pre-Visit Planning leads to...
• 105% increase in advanced care planning documentation
• Health Care Proxy completion rate increased from 37% to 80%
• 28.8% increase in A1C screening, 14.6% increase in flu vaccination rates and 6.8 decrease in no show rates among disadvantaged patients.
• 43% increase in pneumococcal vaccination rates
• Increased PHQ-9 screenings from 4.5% - 84% (Sustained)
• Saved providers an hour a day, and nurses two hours a day

Conclusion
• Increase in documentation of pre-visit planning
• Increase in facilitating conversation between Provider and Patient
• Increase in screening completion and vaccinations
• Decrease in no show rates.
• Increase completion of ACP
• Work time saver for providers and nursing staff

References

Literature Review
The articles that we used for our research used systematic review, direct observations, chart review and phone calls to patients to find their information. Overall they were looking at how pre-visit planning effects staff time management, screening completion, patient EHR usage, health care proxy completion, vaccinations, and no show rates.