



## Improve Patient Care and Maximize Time With Your Patients

Do you spend the first 5-10 minutes of each appointment reviewing who the patient is, what preventative care they need, have they received care from other providers or have had a recent ER or hospital visit since the last office visit?

Pre-visit planning can reduce the amount of time required in the exam room with a patient and adds efficiency and organization to the patient visit. A pre-visit plan can be different for each practice but should fit into the workflow of the practice.

Consider evaluating your pre-visit planning process with the strategies below.

### Plan Forward

At the end of the current visit, implement a checklist to help plan for the next visit while the patient's needs are fresh in your mind (future lab or test orders, visits with other providers, medication changes, etc.).

### Look Back

72 hours before the visit:

Review Plan Forward checklist, gather recent tests and notes, assess refills, check for ER visits or admissions, alert provider to updates and prep patient for appointment.

### Pre-visit Lab Testing

Schedule labs before visits based on turnaround times, allowing providers to review results with patients during the appointment. This streamlines care, reduces follow-up communications and enhances the patient experience.

### Pre-visit Phone Call

48-72 hours before the visit:

Contact the patient to discuss the upcoming appointment and complete pre-visit tasks. This includes reminding them to bring all current medications and supplements for review (Meds in Check Program), conducting falls or depression screenings, discussing preventative care needs and confirming the appointment date and time. Completing these steps prior to the visit streamlines the in-office process and maximizes face-to-face time with the provider.

### Care Team Huddle

Some practices have a 15-30 minute huddle before morning shifts to review the needs of each patient's upcoming appointment for the day. They repeat the huddle after the lunch hour before seeing patients.

### Pre-visit Questionnaire

Provide patients with a list of questions to complete in the waiting room or through the online portal.