



**Dramatic Performance Improvement™**

## **Visit Prep Toolkit**

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- Verify that the provider is the PCP.
- Is the patient our patient? Are they assigned to us for their coverage?
- Verify that the particular provider can provide that type of visit (e.g. does this provider do IUD insertions).
- Read the visit notes from the last few visits to see if any labs, lab results or diagnostic test results will be needed for the visit (if so be sure they were done and then get the report or results NOW instead of waiting).

For Pediatrics:

- Do we have an immunization record for this patient? For IMMZ, look patient's izations (in CAIR or other system) and/or ask patient to bring record with them.
- Check to see if child is due for vaccines, if so, make note of what may be due.
- For adolescents, is there a behavioral questionnaire we will need to fill out? Is it already in scanned documents or do we need to ask them to fill one out when they arrive?

Additional details if the patient is coming in for a Well Exam:

- Tell patient that if they need a form filled out (for school or sports), to bring it, give it to MA upon arrival. Put form in chart and be sure that all past Well exams are noted and dated on Health Supervision Summary.
- If they have had a WCC recently, are they due for one (will we get reimbursed for doing a physical today or is the interval too short)?

For Adults (over age 18):

- Check to make sure that Health Maintenance Checklist is completed.
- Be sure that patient has documented hx of Tdap, flu, and pneumonia vaccine or are they due?
- Are they using a birth control method, are they of the age when you should ask them if they want to discuss this during the visit or with the nursing staff?
- Have they been hospitalized or in the Emergency room recently? If so where, when and for what? Do we have a copy of the records? Can we get them now instead of when the patient is here?
- Do we have any notation on advance directives or a past advance directive discussion?
- Review the problem list looking for chronic diseases which may need follow up (HTN, depression, DM, abnormal paps, etc).
- HgA1c is done? Monofilament in last 3/6 months?
- A1C/BMP or CMP/lipids Q6mo minimum (every 3 months if A1C was > 7)
- Microalbumin Q1 year
- EKG Q5 yr. HTN/DM
- Vision exam yearly?
- PHQ-9 (Depression screening) done yearly?
- For diabetics: Is education due? Note this so chronic care coordinator is available.