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Smart Phrase Revision to Improve Primary Care Pre-Visit Planning Workflow

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Smart Phrase Revision to Improve Primary Care Pre-Visit Planning Workflow



Background

- Preventive care saves healthcare dollars and lives (Taksler et al., 2018).
- Only 50% of Americans are up to date on recommended screeners (Krist et al., 2012)
- According to Healthy Vermonters 2020, Vermont adults are below goal for most preventive care services (“Healthy Vermonters 2020,” 2017)
- Pre-Visit Planning (PVP) is a strategy to collect and organize key information before a patient’s visit (Sinsky et al., 2015)
- An Adult Primary Care clinic in VT uses a PVP template in the EHR called a Smart Phrase but it is inconsistently utilized

Purpose

- Revise current PVP Smart Phrase to improve its utility and usefulness by:
 - Evaluating current PVP process and staff attitudes towards this process
 - Creating a revised PVP Smart Phrase that meets the needs of the provider and medical assistant (MA)
 - Determining the impact of the revised Smart Phrase on MA and provider satisfaction

Rationale

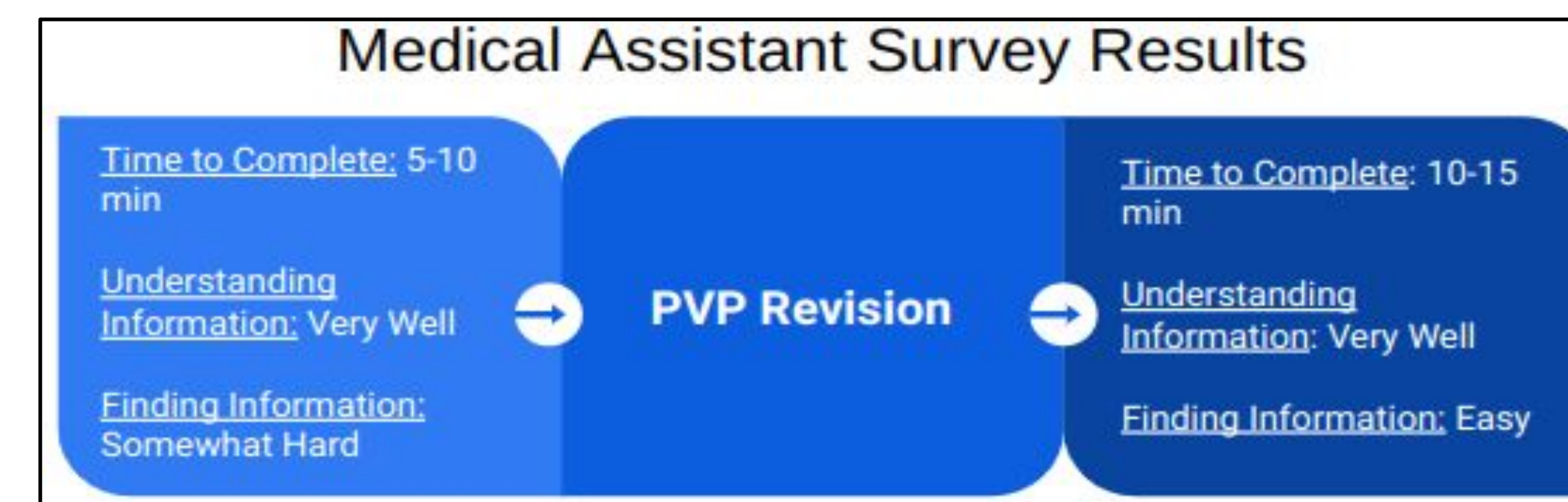
- Supported by P3 Model for preventive care implementation (Bednarczyk et al., 2018)
- In 3 mixed methods studies of primary care sites implementing PVP found that it:
 - Identifies patients not at goal and communicates that to the provider (Huebsch et al., 2015)
 - Increases patient confidence in the provider from 87% to 99% (Chapman & Blash, 2017)
 - Improves delegation, information gathering and communication (O’Malley et al., 2015)

Materials and Methods

- Materials:
 - Physical Factors: Adult Primary Care site using EPIC EHR
 - Sociocultural Factors: Team-Based Medical Home
- Methods:
 - Pre/Post intervention survey with Likert and free text questions to MA and provider
 - 4 PDSA cycles with informal feedback
 - Final Smart Phrase Revision:

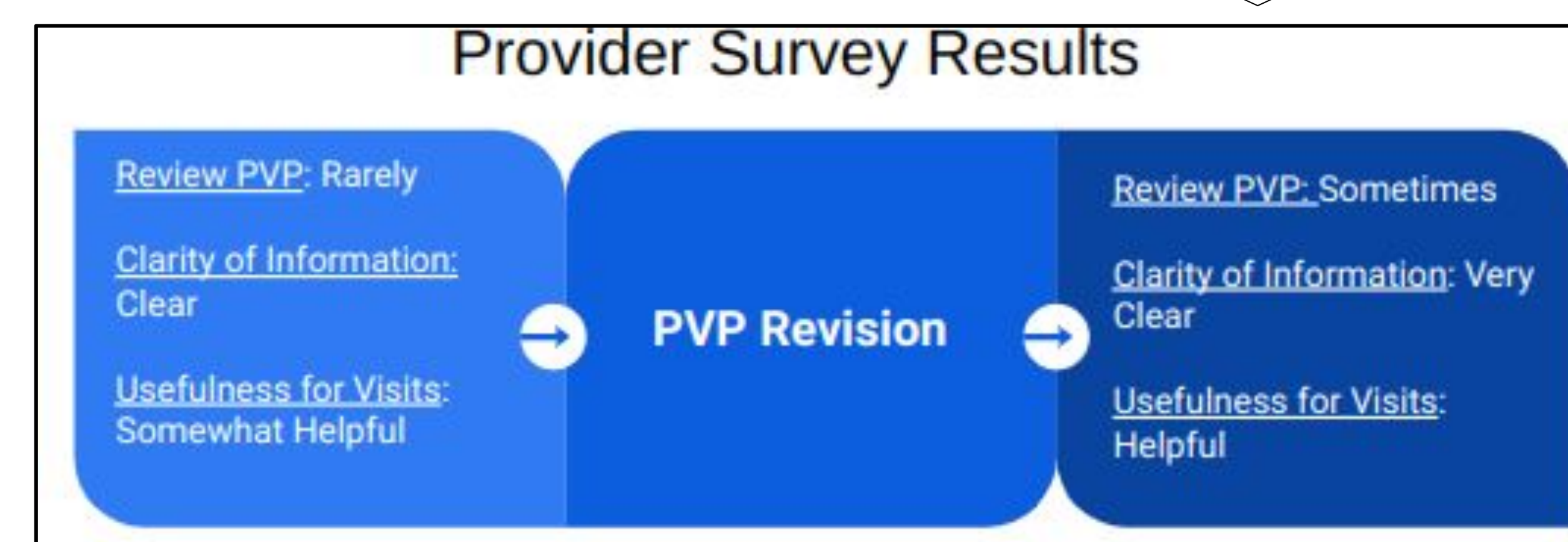
Results

- 7 week implementation with Smart Phrase used 50 times
- Survey: n=2



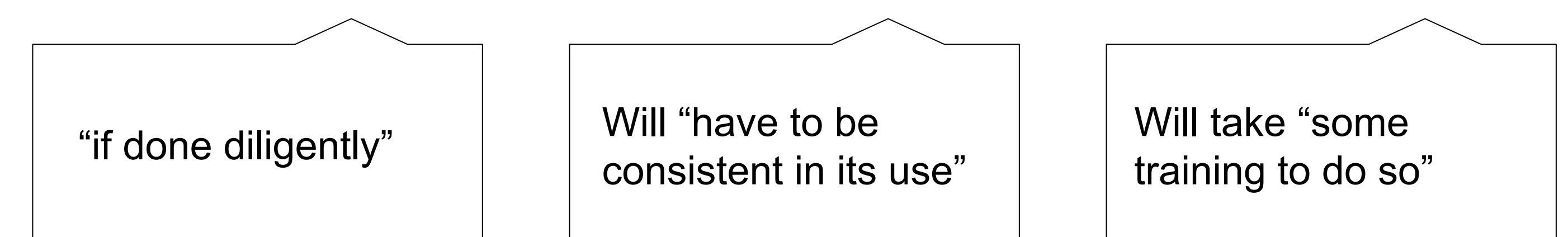
“Perhaps a better way to prepare for an appointment”

“Can improve patient care”



Conclusions and Implications

- The PVP Smart Phrase revision was:
 - Easier to find the information
 - More helpful for preparing for patient visits
 - More applicable to improving office visit efficiency
 - Referenced more by provider prior to visit
- Increased utilization of the Smart Phrase increases office visit efficiency and leaves more time for preventive care delivery and identification of gaps in care
- This in turn improves patient outcomes and saves healthcare dollars
- Limitations:
 - Small sample size
 - Short implementation period
 - Survey caveats: Can improve patient care:



- Next Steps:
 - Expand to different MA and provider teams
 - Expand to different primary care sites and specialties
 - Collect longitudinal data on preventive care utilization and gaps in care pre/post PVP implementation

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