Office Systems

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Preventive Services Improvement Project Learning Session Breakout 2
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The Office Systems Approach

- Organizational tool: Office Systems Inventory
- Multidisciplinary: involves practice staff at all levels
- Networking: guides practice in building relationships with community partners
Steps in Implementing a Preventive Services Prompting System

1. Agree on Practice-wide Guidelines
2. Embed Guidelines in Clinical Tools
3. Train Staff to Use PSPS to Identify and Prompt Needed Services
Preventive Services Prompting System
# Bright Futures Preventive Services Prompting Sheet

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<th>Age</th>
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**Key**
- RA = action if risk assessment is positive
- Development = structured developmental screening
- Autism = autism-specific screening

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**Using a Preventive Services Prompting Sheet**

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Preventive Services Prompting Systems: Advantages

- Improves rates of care
- Distributes work
- Supports staff in new roles
- Helps organize visit
- Documents what services are completed
- Highlights prevention
- Helps avoid “missed opportunities”
Preventive Services Prompting System: Challenges

- Changing recommendations
- Variable opinions within practice
- Relies on practice-wide guidelines
- Creates new roles for staff and a need for training
- Takes advantage of reliability principles
Overcoming Challenges

- Changing Recommendations
  - Review guidelines annually.
  - Divide and conquer.

- Variable Opinions Among Providers
  - Strive for a minimum set of services.
  - Rely on evidence to prioritize.
  - Customize to your patient population.
  - Agree to disagree.
Overcoming Challenges

Practice-wide Guidelines
- Concentrate on most important problems patients face.
- What do you already agree on?
- Tools to support Guidelines are important.

New Roles for Staff
- Embed roles in new staff orientation.
- Document expectations.
- Provide training at staff meetings.
Supporting Your System

- Review guidelines regularly.
- Share guidelines with entire staff.
- Define staff roles.
- Provide staff training.
- Embed guidelines in chart tools (preventive services prompting sheet).
Supporting Your System

- Activate families to prompt for needed services.
- Link with community for outreach.
- Identify patients who fall behind.
- Use your computer as prompt.
- Gather feedback from patients.
Sustaining Change

Fundamental change in office systems

- Practice – wide guideline
- Process is routine
- Process is reliable, and does not depend on particular staff to be present to occur
- Roles at each level are clear and understood
Sustaining Change

New kind of communication with community

- Relationship with key partners
- Networking to facilitate process beyond practice
- Agreements on how to exchange information, e.g. standardized referral process/form
Sustaining Change

Participatory role for parents/family

- Parent is partner in screening
- Parent helps drive change by asking for service
- Parent gives feedback on referral sources and communication process
Recall and reminder system
Use of Recall Reminder System

- Routine way of informing patients about the need to return for services
- System for communication with families
Recall and Reminder Systems

- Literature Review
  - Text message reminder system
    - 4 studies
  - Letter vs. Postcard: No difference and BOTH significantly higher than no reminder
  - Clinic staff reminder significantly more effective in lowering no-show rates compared with automated appointment reminder
Consideration of Children with Special Health Care Needs

- Routine way of identifying children with special health care needs (CSHCN)
- Mechanism for asking and recording:
  - Does you child have any special health care needs?
- Develop standards of care for CSHCN
BFTI: Comparison of Components at Baseline and Follow-up

Percent of Children Age 0-5 Years In 15 Bright Futures Training Intervention Practices With 4 Bright Futures Outcomes Documented by Chart Review At Baseline and Follow-Up

*Baseline percents calculated from 171 charts from 15 practices
**Follow-up percents calculated from 305 charts from 8 practices
Using Risk Stratification
Enhancing the Medical Home

- Utilize surveillance and screening information to risk stratify patient population
- Balance risk factors with protective/resiliency factors
- Can be a simple system or based on multiple factors
Risk Stratification: Advantages for Practice

- Registry development
- Visit planning based on complexity
- Organization for referral and follow-up systems/enhanced tracking
- Ensure continuity
- Increased provider satisfaction
Risk Stratification: Advantages for Families

- Visit scheduling to meet family’s needs
- Enhanced coordination of care
- Enhanced continuity
NC Multifactor Risk Scale

- Completed & updated by child’s PCP
- Identified as child with complex condition in practice management system to alert front office to targeted scheduling.
- Review of 2 yrs of utilization revealed that increased ED utilization and decreased follow-up with PCP trended with psychosocial risk score.
Recall & Reminder Systems

- Paper/Electronic Health Record/ Billing System
- Find out what health plans and Medicaid are doing in your state