

Pre-Visit Planning: Enhancing Patient Care & Closing Gaps

Self Assess Pre-Visits with Scorecards

Pre-visit planning: A proactive approach to prepare for patient appointments in advance, ensuring each visit is productive. Utilize scorecards to identify patients with high priority gaps (e.g., WCV, CCS) before appointments.



Conduct Pre-Visit Outreach

- Identify appointment changes early
- Arrange transportation and additional resources
- Identify during appointments access to resources for future appointments



Identify Gaps

- Before visits utilize patient checklists to identify missed screenings, chronic care needs
- Post visit initiate follow up screenings, offer surveys for feedback



Utilize EHR

- Before visits have necessary visit information on labs, referrals and notes
- Prioritize patient outreach, and action where EMR alerts are underutilized
- During visits update patient portals to provide insight to closing potential care gaps

Take Action : Pre-Visit Checklist



Pre-Visit Tasks:

- ☐ Offer convenient appointment times by keeping blocks of time open for same-day, weekend, and early morning/evening slots.
- ☐ Consider offering telemedicine service (by phone or video chat) as an alternative to in-person appointments.
- ☐ Provide option of registering in advance either by a patient portal or set up an online scheduling system so patients can provide their information before coming in.
- ☐ Have patients' records ready and reviewed and obtain any prior authorizations ahead of visit to expedite care.
- ☐ Notify patients early if long wait times are expected or if there are any last-minute requests for lab work.

Take Action : During Patient-Visit Checklist



During Appointment:

- ☐ Review patients' prescriptions, make sure they understand the importance of their medications, and alert them to any possible adverse drug interactions.
- ☐ Communicate when patients' test results will be available and set reminders to review results with patients in a timely manner.
- ☐ Ask patients if they have any questions or concerns regarding their care.

Take Action : Post-Visit Checklist



Post Appointment:

- ☐ Immediately schedule patients' follow-up appointments to ensure continuous care.
- ☐ Account for specialist care by making sure specialist appointments were made or help patients schedule appointments if needed.
- ☐ Encourage patients to use the patient portal, which lets them access their health records and ask providers questions.
- ☐ Share health records with the patient's other providers as allowable under HIPAA to keep everyone up to date and assist with continuity of care.

Let's make a change!

Benefits of Pre-Visit Planning

Improves care Quality

Identifies gaps
before the visit
so they can be
addressed in real
time.

Saves time and reduces costs

Streamlines
workflows,
reduces
administrative
burden

System Improvements

Improved gap
closure rates
and smoother
transitions to
new EMR
systems.

Enhances satisfaction

Fewer missed
opportunities,
better
communication,
more meaningful
visits.

Call your Account Executive for QI support

Need help? Interested in data sharing through Epic Payer Platform? Contact your AE to connect with a Quality Performance Specialist for guidance and support.

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