

## ***Inreach/Planned Care – Peer Sharing Highlights***

Updated August 23, 2019

*On August 15, workshop attendees shared the current best practices across CAPH-member primary care clinics for patient inreach in planned care.*

### Visit Templates:

- Scheduling templates (EPIC) (Riverside)
- Hard stops for AVS printing (Contra Costa)
- Dot phrases (Ventura)
- Smart sets (UC Irvine)

### Room and Provider Prep:

- Using a health educator to prime patient for provider visit (Contra Costa)
- Do an excellent job prepping rooms for the providers (Santa Clara)

### Plan Today's Visit:

- Pre-visit → prep → visit → post-visit (Santa Clara)
- Team huddles at most clinics where care gaps are discussed (some include behavioral health) (San Francisco)
- Combine eligibility file and HEDIS care gaps (from health plan) (Ventura County)
- Chase lists (Riverside)
- Smart sets (Contra Costa)
- Overbook appointments to counteract high “no show” rate and increase productivity (Riverside)
- Designated times and # → 3 in AM, 3 in PM (Riverside)
- Screening reminders in patient schedule (Kern)

### Standing Orders:

- Built in mammogram screen (Contra Costa)
- Standing orders for various health maintenance items so MAs and nurses can order N/pt = more time for provider (Alameda)

### Coordinated Care:

- Identify patients experiencing “discontinuity” or “confusion” and providing care coordination and community resources education (Riverside)
- Provide resource information (Santa Clara)
- Complex care visit while patient is inpatient (Santa Clara)
- INPT: RN CM + social workers; complex care nurses/program (Santa Clara)
- Specialty/primary care phone calls (Santa Clara)
- Collaborative model (UCSF)
- Embedded psych for behavioral health (UCSF)
- Health maintenance as an outreach prior to PCP visit (Santa Clara)
- Communication with MA staff and providers through virtual “sticky notes” (Ventura)
- Reduced long wait times by having RNs and providers review charts for pre-visit tests and reminding PT's/cancelling appointments; opening up more visits for PTs and saving provider time (Contra Costa)

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### Prep Charts:

- Dedicated pre-visit planners (UC Davis)
- Dot phrase in EPIC for pre-visit and rooming for uniformity (Riverside)
- Weekly 1 hour huddle with care team including front & back (Monterey)
- MAs at some sites do comprehensive chart reviews and many have dedicated time to review (San Francisco)
- “Checklist” to meet org. goals (Ventura)
- Chart alerts for care team to identify metric gaps (San Joaquin)