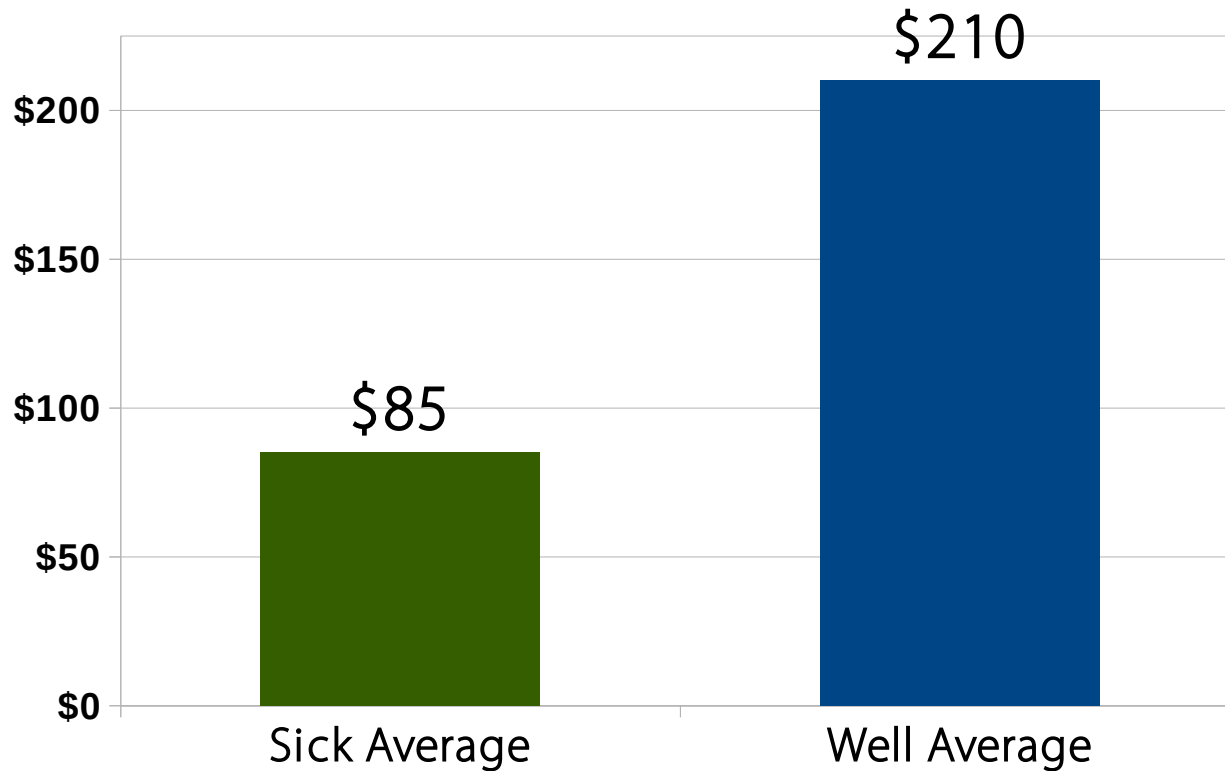


Successful Patient Recall Strategies

Chip Hart
Dan Gillette
PCC UC 2015

Why focus on preventive care?

Preventive care pays well.






Average Payment Per Visit Type

PCC TX Clients, 2013-2014

Why focus on preventive care?

Preventive care fills your schedule.

You can't recall children for an ear infection they are going to get in three weeks. Any open slots you have in your appointment book cost you money. Idle physicians are dangerous!

Monday 07/08/13	
9:00 am	
9:15 am	
9:30 am	Sick Call
9:45 am	
10:00 am	
10:15 am	
10:30 am	
10:45 am	
11:00 am	
11:15 am	
11:30 am	Sick Call

Why focus on preventive care?

Preventive care expands your value to the customer

Right now, to many of your families, a visit to your practice is worth the price of a copay. Preventive care is your chance to reestablish the relationships you have with your patients and return to being the Trusted Messenger and provide a true Medical Home.

With HDHPs and Minute Clinics on the rise, this is more important than ever.



Why focus on preventive care?

Preventive care is a P4P measure.

Already, well visit rates and chronic disease management measurements are being used as P4P measurements in PA, MA, RI, CA, NC, [add your state here!]. You don't have a choice.



Why focus on preventive care?

Preventive care is good for your patients.

How many instances of scoliosis, hearing disability, vision problems, eating disorders, family violence, or the dozens of other developmental issues have you spotted during well visits during your career?

More importantly, how many times have you spotted something and said to yourself, "I wish this patient had come in last year..."

Why focus on preventive care?



Because this is what you do!



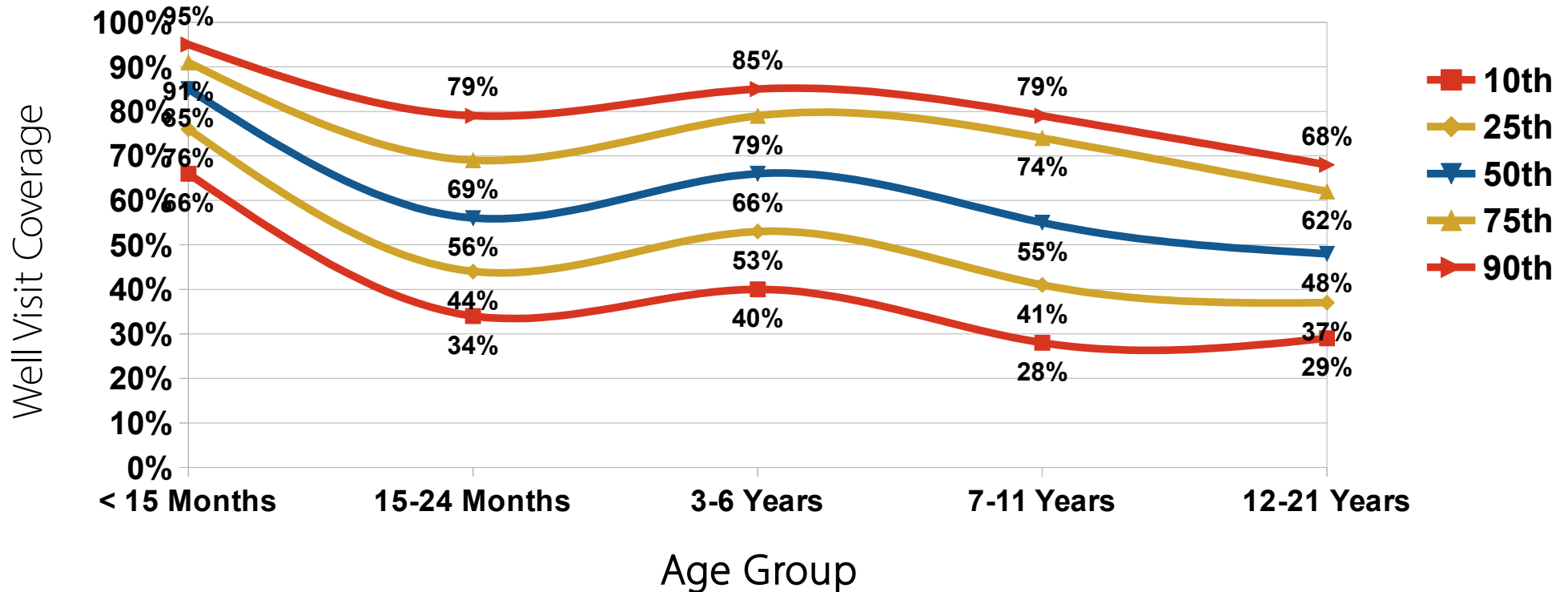
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Control Your Future™

How Am I Doing Now?

Well Visit Coverage

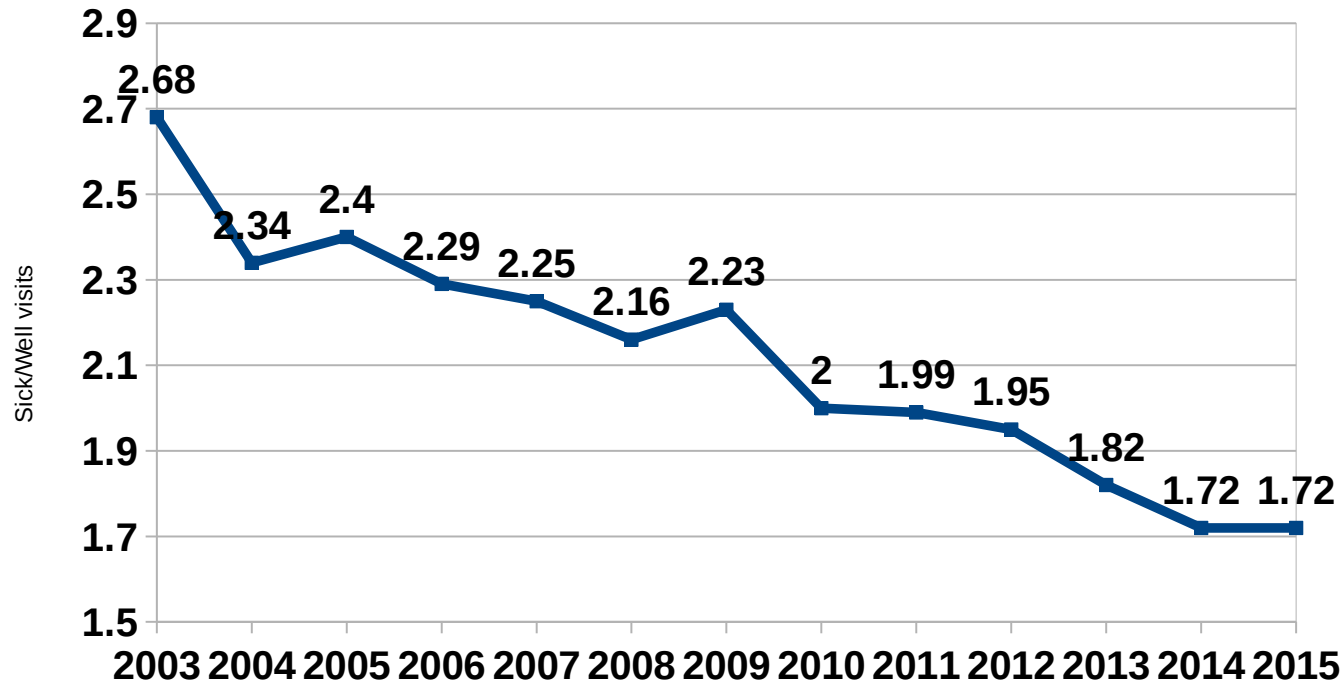
PCC Clients, July 2012



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How Am I Doing Now?



Sick To Well Visit Ratio
PCC Clients, 2003-2015

What Are Effective Tools?



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What Are Effective Tools?



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What Are Effective Tools?



The image shows an email appointment confirmation for a child named Zachariah. At the top is a photo of six diverse children smiling. Below the photo, the name 'Zachariah' is displayed in red. The text states he has an appointment with Dr. Elizabeth Casey on Tuesday, July 17th at 2:00 PM. A red button labeled 'CONFIRM APPOINTMENT' is provided. To the right, the physician's contact information is listed: Physician's Computer Company (PCC), US, 20 Winooski Falls Way Suite 7, Winooski, VT 05404, (800)722-7708. A 'MAP TO OFFICE' button with the Google logo is also present. At the bottom, it says 'Thank You!' and includes a footer: 'Email generated by HouseCalls™. HouseCalls is a trademarked product of TeleVox Software, Inc. All rights reserved.'

patient's first name

physician name is optional

date and time

appointment location

Pediatric Associates:
Johnny has an appt with Dr. Smith on Sat Apr 28 @2:30p. To confirm txt YES. To decline txt NO. Txt Help 4 help.



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What Are Effective Tools?



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Secrets Used By Real Practices

You can't recall them all – so, pick the lowest hanging fruit.

Secondary Visit Category: 99394 Visit

Primary Visit Category	Secondary Visit Category	Ins Group at Time of Service	Number of Visits	Units Per Visit	Avg Charge Per Visit	Avg Deposited Per Visit
Well Visit	99394 Visit	Personal/No Insurance	18	7.28	\$187.89	\$111.63
Well Visit	99394 Visit	Other	34	7.35	\$240.36	\$119.30
Well Visit	99394 Visit	Medicaid	27	7.78	\$265.01	\$35.68
Well Visit	99394 Visit	Cigna	17	8.65	\$349.76	\$211.43
Well Visit	99394 Visit	Aetna	12	7.00	\$348.50	\$216.66
Well Visit	99394 Visit	BCBS	73	7.08	\$273.05	\$160.95
Well Visit	99394 Visit	UHC	74	6.58	\$289.50	\$212.88
Well Visit	99394 Visit	Peach State	165	7.46	\$235.48	\$80.92
Well Visit	99394 Visit	Coventry	15	7.53	\$257.53	\$203.80
Well Visit	99394 Visit	Tricare	16	8.00	\$395.68	\$235.62
Well Visit	99394 Visit	Wellcare	25	6.96	\$237.31	\$70.51
			476	7.29	\$262.97	\$131.66



Secrets Used By Real Practices

Use *personalized* patient letters that are age, sex, and language specific. Do not pull punches!

Dear Mary and John:

This is just a friendly reminder that **Lisa** is due for her sixteen year physical. Remember that she will need to have a physical for her driver's permit, which can not be done more than sixty days prior to her 16th Birthday...

...**Steve** is now 10, making him eligible for the first of his two expected Gardasil vaccinations...

...with kindergarten starting in the fall, you will want to schedule **Bianca's** Well Visit as soon as possible, before the available slots fill up...

Secrets Used By Real Practices

Market your practice at every opportunity!

Dear Parents:

It's that time of year again and the pediatricians of MSC Pediatrics would like to take the time to remind you to schedule **Harmon's** flu shot....

...we would also like to welcome Dr. Jane Mulligan to our practice. Dr. Mulligan specializes in adolescent girl physicals...

...don't forget that we are still open every night until 8pm and on weekends...



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Secrets Used By Real Practices

**Use the communication to save time, set expectations,
*improve care!***

Please complete this form for your son, **Harmon**, and bring it with you to his next visit...

...review the enclosed information and prepare your most important two or three questions to ask the physician...

...visit our [WWW](#) site and download a copy of the anticipatory guidance that we distribute at every visit...

Secrets Used By Real Practices

Use your computer system!

Recent and Upcoming Appointments

Last Visit: 02/12/13 (4m 3w ago) Dr. Gomez

Diagnosis: Urinary Tract Infection

Last Physical: 06/24/12 (1y ago)

Next Physical Due: 06/30/13 (8d overdue)

Scheduled Appointments: none



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Secrets Used By Real Practices

Meet the scheduling needs of your customers.

- Use PNP's to provide morning, evening, and weekend well coverage for families who work. Many of your families want to do the right thing, but find it difficult to schedule time during working hours to bring in their children.
- Designate specific providers for adolescent physicals, by gender.



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Secrets Used By Real Practices

Change the expectations of and within your practice.

- Reward physicians who produce more well visits.
- Require patients to schedule their well visits at the time of service.
- Use benchmarks – sick visit ratio, immunization rates – to measure your progress.
- Make the recall process automatic - patient recall notices should happen like billing!

Secrets Used By Real Practices

Change your tune.

Even if you have developed the world's greatest method for recalling patients, change the message or the way you deliver the message from time-to-time so your patients don't ignore it.

Secrets Used By Real Practices

Recall them more than once.
 Measure your results.
 Compare methods!

Pediatric Associates
 RECALLER LOG 2009

Well Visits
2009 q1-2

Patients

PHYSICIAN	MONTH(S)	CALL DATE	Overdue	# PATIENTS	DIFFERENCE	% INC	# PATIENTS	DIFFERENCE	% INC
DR HART	Dec-Feb	2/8/2008	204	174	30	15%	116	88	43%
	Mar	3/4/2008	97	73	24	25%	47	50	52%
	Apr	3/25/2008	87	39	48	55%	35	52	60%
	May	4/28/2008	122	99	23	19%	42	80	66%
	June	5/21/2008	198	152	46	23%	78	120	61%
DR SORAYA	Dec-Feb	2/11/2008	243	225	18	7%	150	93	38%
	Mar	3/4/2008	138	112	26	19%	84	54	39%
	Apr	3/24/2008	121	71	50	41%	69	52	43%
	May	4/30/2008	122	100	22	18%	63	59	48%
	June	5/19/2008	139	117	22	16%	72	67	48%
2009 q1-q2 totals			1471		309	21%		627	43%

Twice the return...



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Recaller Uses

- Getting patients back for well visits
- Flu shots
- Asthma rechecks
- ..and many more!

Next Physical

Relation to Bill Payer:	Daughter	Recent and Upcoming Appointments			
Date of Last Visit:	Mar 30, 2015	Last Visit: none			
Date of Last Physical:	Feb 4, 2015	Last Physical: 09/16/11 (3y 9m ago)			
Date Due for Next Physical:	Feb 10, 2016	Next Physical Due: 09/21/12 (2y 8m overdue)			
		Scheduled Appointments: none			

SAM Search Criteria					
Name	Visit Reason	PCP	Provider	Mins	L
X Jennifer Long Name H		td			0

Time Frame: [] [] [] []

PATIENT: Jennifer L Hetrick,	PAT STATUS:		LAST PHYS:	02/04/15
DOB: 03/10/2014	CUST STATUS:		NEXT PHYS:	02/10/16
AGE: 1 yr, 3 mos	GUAR STATUS:	Billing Problem, N	NEXT APPT:	

Find the next physical date in a lot of places

Call PCC support to get help with configuring your scheduler screen

Recaller Considerations

- Start with the most important inclusion criteria
- Exclude inactive patients and those who haven't been seen in the last 3 years
- Use include and exclude to refine your report

Building a Recaller Report

Recaller - Criteria Selection

1,646 Patients
1,035 Guarantors associated with these Patients
1,029 Custodians associated with these Patients

Build a list of patients based on the following criteria:
Include by Date of Physical Due
and Exclude by Appointment (All Providers)
and exc*

Next Output Restore Criteria Save Criteria Report Details Use 'or' Criteria Back

Using inc* or exc* will help you to find the desired criteria fast

Building a Recaller Report

Recaller - Criteria Selection

88 Patients
84 Guarantors associated with these Patients
83 Custodians associated with these Patients

Running total of affected patients; keep adding criteria until the number is workable

Build a list of patients based on the following criteria:
Include by Date of Physical Due
and Exclude by Appointment (All Providers)
and Exclude by Flag - Patient Flag
and Exclude by Procedure (All Providers)
and

Save your work once you're done!

Next Output Restore Criteria Save Criteria Report Details Use 'or' Criteria Back

Get a quick idea of how many patients are affected



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Output

Recaller - Output

To save this report for future use, press **F4**.

88 Patients
84 Guarantors associated with these Patients
83 Custodians associated with these Patients

1. What type of output do you want?

<input type="checkbox"/>	Standard Lists	Patient Standard List
<input checked="" type="checkbox"/>	Form Letters	Patient Recaller Lists/Form Letters
<input type="checkbox"/>	Labels	Patient Labels
<input type="checkbox"/>	Subtotal by Age and Sex Report	

2. How should the output be sorted?

<input checked="" type="checkbox"/>	Last Name
<input type="checkbox"/>	Zip Code
<input type="checkbox"/>	Birthday
<input type="checkbox"/>	Birth Date

Use computer generated form letters to give your patients that personalized experience they want

Process Save Criteria Report Details Back

Talk to PCC support about adding new form letters

Dashboard Tools

Measure: Well Visit Rates - Patients 12-21 Years

Choose a measure

Dashboard reports updated as of 6/7/2015

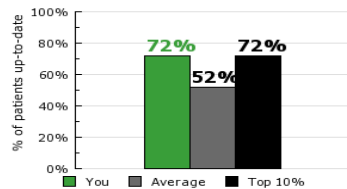
Your Score: **70** out of 100

This measure shows the percentage of all active patients who are currently between the ages of 12 years and 21 years who have received at least one well visit in the past year. Active patients are those that have been seen at least once (for any visit) in the past three years, and do not have a flag indicating they are inactive.

You have **3,638** active patients between the ages of 12 years and 21 years.

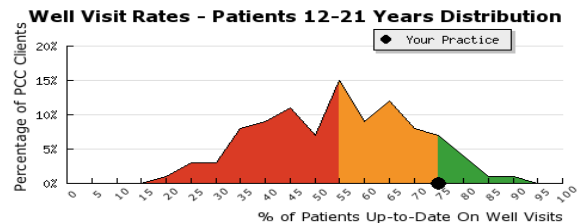
[1,070 of these patients are overdue for their well visit.](#)

How You Compare



PCC Client Distribution

In addition to comparing your practice performance to the pediatric average and top performers, it can also be useful to see a representation of PCC client distribution for this measure. The graph to the right is our unique representation of distribution, showing the range your practice is in (the black dot on the x axis) and how many practices are in other ranges from the worst performance (the red) to the best performance (the green).



See your historical well visit rates on your dashboard

Notify

- Notify – PCC's automated patient notification system
- Uses the exact same reporting interface as the recaller
- Automatically send calls, texts or emails to remind patients about upcoming, or overdue, appointments