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!
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!

PCC Pediatric EHR Solutions  Control Your Future™
How Am I Doing Now?

Well Visit Coverage

PCC Clients, July 2012

Age Group

Well Visit Coverage

- 10th
- 25th
- 50th
- 75th
- 90th

< 15 Months | 15-24 Months | 3-6 Years | 7-11 Years | 12-21 Years

- 0% | 10% | 20% | 30% | 40% | 50% | 60% | 70% | 80% | 90% | 100%

- 91% | 85% | 79% | 79% | 68%
- 69% | 79% | 74%
- 56% | 66%
- 44% | 53%
- 34% | 40%
- 28% | 41%
- 29% | 48%
- 37% | 62%
- 29% | 66%

PCC
Pediatric EHR Solutions

Control Your Future™
How Am I Doing Now?

Sick To Well Visit Ratio
PCC Clients, 2003-2015
What Are Effective Tools?

John S. Smith, DDS
Custom Imprinted Up to 5 Lines
28 Spaces Per Line
Order From SmileMakers
123-456-7890

RETURN SERVICE REQUESTED

dental care

JUST A FRIENDLY REMINDER...
It’s time for your professional teeth cleaning and oral health examination.
Call our office now for your appointment.

Pediatric EHR Solutions
Control Your Future™
What Are Effective Tools?
What Are Effective Tools?
What Are Effective Tools?
You can't recall them all – so, pick the lowest hanging fruit.

<table>
<thead>
<tr>
<th>Secondary Visit Category: 99394 Visit</th>
<th>Number of Visits</th>
<th>Units Per Visit</th>
<th>Avg Charge Per Visit</th>
<th>Avg Deposited Per Visit</th>
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<td>7.28</td>
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<td>7.35</td>
<td>$240.36</td>
<td>$119.30</td>
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<td>7.78</td>
<td>$265.01</td>
<td>$35.68</td>
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<tr>
<td>Well Visit 99394 Visit</td>
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<td>8.65</td>
<td>$349.76</td>
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<td>7.29</td>
<td>$262.97</td>
<td>$131.66</td>
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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...
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...
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
Meet the scheduling needs of your customers.

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

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<th>Physician</th>
<th>Month(s)</th>
<th>Call Date</th>
<th>Overdue</th>
<th># Patients</th>
<th>Difference</th>
<th>% Inc</th>
<th># Patients</th>
<th>Difference</th>
<th>% Inc</th>
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<tr>
<td>DR Hart</td>
<td>Dec-Feb</td>
<td>2/8/2008</td>
<td>204</td>
<td>174</td>
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<td>116</td>
<td>88</td>
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<tr>
<td></td>
<td>Mar</td>
<td>3/4/2008</td>
<td>97</td>
<td>73</td>
<td>24</td>
<td>25%</td>
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<td>46</td>
<td>23%</td>
<td>78</td>
<td>120</td>
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<td>DR Soraya</td>
<td>Dec-Feb</td>
<td>2/11/2008</td>
<td>243</td>
<td>225</td>
<td>18</td>
<td>7%</td>
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<tr>
<td></td>
<td>Mar</td>
<td>3/4/2008</td>
<td>138</td>
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<td>84</td>
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<td></td>
<td>Apr</td>
<td>3/24/2008</td>
<td>121</td>
<td>71</td>
<td>50</td>
<td>41%</td>
<td>69</td>
<td>52</td>
<td>43%</td>
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<tr>
<td></td>
<td>May</td>
<td>4/30/2008</td>
<td>122</td>
<td>100</td>
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<td>63</td>
<td>59</td>
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<tr>
<td></td>
<td>June</td>
<td>5/19/2008</td>
<td>139</td>
<td>117</td>
<td>22</td>
<td>16%</td>
<td>72</td>
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<tr>
<td>2009 q1-q2 totals</td>
<td></td>
<td></td>
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<td>1471</td>
<td>309</td>
<td>21%</td>
<td>627</td>
<td>43%</td>
<td></td>
</tr>
</tbody>
</table>
Recaller Uses

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

Using inc* or exc* will help you to find the desired criteria fast
Building a Recaller Report

Get a quick idea of how many patients are affected

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

Save your work once you're done!

Next  Output  Restore Criteria  Save Criteria  Report Details  Use 'or' Criteria  Back
Talk to PCC support about adding new form letters.
Dashboard Tools

See your historical well visit rates on your dashboard

PCC Pediatric EHR Solutions  Control Your Future™
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