

# Successful Patient Recall Strategies

**Chip Hart**  
**Physician's Computer Company**  
**July, 2013**



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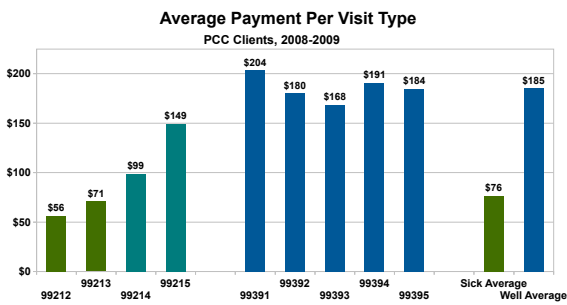
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## Why focus on preventive care?

Preventive care pays well.



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## 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



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## 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 \$10 or \$15 – the price of a copay. That's less than their last hair cuts, visits to KFC, cable bills, or trips to the vet. 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.



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## 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.



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## 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..."



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## Why focus on preventive care?



*Because this is what you do!*

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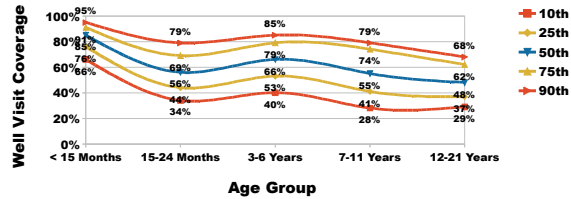
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## How am I doing now?

### Well Visit Coverage

PCC Clients, July 2012



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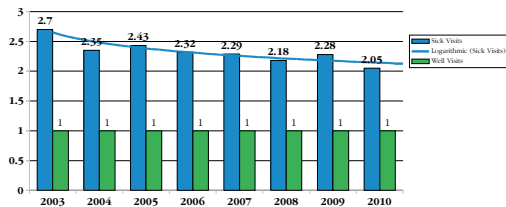
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## How am I doing now?

A quick measure of your existing preventive care success is examine your Sick-to-Well Visit ratio.

PCC Pediatric Offices, 2003-2010



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# What are effective recall tools?

## Printed Mail Correspondence



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# What are effective recall tools?

## Telephone



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# What are effective recall tools?

## Automated Options

patient's first name → Zachariah

physician name is optional → Dr. Elizabeth Casey

date and time → Tuesday, July 17th at 2:00 PM

appointment location → Pediatric Associates

**CONFIRM APPOINTMENT**

MAP TO OFFICE

Thank You!

Email generated by iPractice24/7. iPractice24/7 is a trademarked product of iPractice Software, Inc. All rights reserved.

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 recall tools?

Face To Face



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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



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## 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...



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## 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...



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## 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!

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## 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.

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# Secrets Used by Real Practices

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

Pediatric Associates  
RECALLER LOG 2009 Well Visits  
2009 vs 08 Patients

PHYSICIAN	MONTHS	CALL DATE	Overdue	# PATIENTS	DIFFERENCE	% INC	# PATIENTS	DIFFERENCE	% INC
DR HART	Dec-Feb	2/8/2008	204	193	11	5.7%	118	85	43%
	Mar	3/4/2008	97	76	21	27.6%	47	29	62%
	Apr	3/25/2008	87	66	21	25.6%	35	31	89%
	May	4/28/2008	122	88	34	39%	43	45	105%
	June	5/21/2008	138	102	36	35%	78	76	99%
DR SCORAYA	Dec-Feb	2/11/2008	243	223	20	9%	155	88	38%
	Mar	3/4/2008	138	114	24	18%	84	54	29%
	Apr	3/24/2008	151	71	80	41%	68	83	48%
	May	4/30/2008	122	103	19	15%	63	60	48%
	June	5/19/2008	139	117	22	16%	73	66	43%
2009 1-12 totals				<b>1474</b>	<b>309</b>	<b>21%</b>	<b>627</b>	<b>43%</b>	

Almost twice the return...

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