Pre-visit planning is a proactive approach to care that ensures each visit is meaningful and well-organized by shifting administrative tasks out of a patient’s appointment time so team members can focus on the patient — not paperwork. With pre-visit planning, providers have the information they need at the time of the visit, and the care team can address the patient’s needed services based on evidence-based care. Plus, staff have more time to collect copays, schedule necessary follow-ups and perform other tasks that must be completed while the patient is onsite.

Why plan?

It’s a common perception that the physician office visit has become more about administration and less about care delivery. Patients complain that most of their time at the doctor’s office is spent waiting or doing administrative tasks rather than spending time with their physician. Staff are inundated with paperwork and processes that delay visit start times and impact patient flow. Physicians have a number of care coordination tasks that erode productivity and impede their ability to practice medicine.

Why is the practice doing tasks during the patient visit that do not require the patient to be present?

More practices are anticipating the tasks necessary to support the patient’s visit and are proactively completing them in advance, promoting streamlined, coordinated care that respects everyone’s time.

With pre-visit planning, you can:

- Manage time more efficiently
- Streamline and coordinate care
- See more patients each day
- Focus on delivering patient-centered care
Establishing pre-visit planning

- Prepare a flow chart of all patient interactions. List every event from the patient’s first call through the office visit, including all follow-up tasks.
- List all staff positions—clinical and administrative—that are part of the process.
- Define tasks and roles.
- Regardless of practice size, allocate all tasks to specific individuals and hold them accountable for timely execution.
- Note when each task gets done. Anticipating patient needs and organizing staff resources to meet those needs lets everyone focus on serving patients while they are in the office.
- Allocate the timing of task execution by categorizing tasks as one of the following:
  - Pre-visit care management: tasks to complete before the patient arrives
  - Onsite visit management: tasks to complete while the patient is in the office
  - Postvisit care management: tasks to complete after the visit or in anticipation of the next visit

Piloting pre-visit planning

- Select a frequently seen condition or patient population. For example, focus on preventive services or care for a chronically ill population. Use patient registries or Electronic Medical Records (EMRs) to pull this data.
- Define the Evidence-Based Guideline (EBG) for the selected population or condition so the care team agrees on and uses the same standard of care. This process allows for more consistent care, delivery of services and outcomes throughout your practice.
- Standardize processes and protocols, such as standing orders based on EBGs. Standing orders tell your team when and how to execute a task without discussion or delay. They are written documents containing rules, policies, procedures and regulations for the conduct of patient care in various stipulated clinical situations. Standing orders usually name the condition and prescribe the action to be taken in caring for the patient, including the dosage and route of administration for a drug or the schedule for the administration of a therapeutic procedure.
- Incorporate point-of-care reminders from the EMR to drive pre-visit planning or medical record review.

Involving patients in pre-visit planning

Patients should be active members of their health care team and play a part in pre-visit planning. Outreach is an integral component of pre-visit planning. As part of outreach for patients who have already scheduled appointments, office staff can gather information from the patient as well as educate the patient about ways to make the visit more successful.

To make visits more successful and streamlined, staff should remind patients to:

- Complete required paperwork prior to their visit.
- Complete labs and/or imaging studies and bring their results.
- Note any specialist, hospital or ER visits since their last office visit.
- Compile their personal and family health history.
- Bring all medications or a list of them.
- Write down questions they want to ask their doctor.
- Bring their insurance card.