Followup with Patients

Overview

Followup, in terms of a primary care setting, is the act of making contact with a patient or caregiver of a patient at a later, specified date to check on their progress regarding a change or action that took place at their last appointment or contact. You can use followup for:

- Monitoring health such as checking blood pressure values.
- Reinforcing knowledge and action plans.
- Confirming medication adherence.
- Scheduling appointments.
- Verifying follow-through on referrals.
- Reporting lab results.

Contact with patients between office visits can enhance patients' sense of being cared for by your practice. Studies show that patients appreciate and respond well to followup contact. Establishing a system to followup with patients is also beneficial for the clinic staff. The additional contact with patients can give staff reassurance that the patients understand what they need to know and do.

Purpose

To outline different followup options and how to use them.

Action

1. **Identify ways to initiate and track followup.**
    - Your record-keeping system will largely determine how followup contacts are initiated. Electronic systems often have built-in mechanisms to signal such actions. Many registries can alert the staff that a planned followup is needed. If you do not have an electronic system, think of the other ways you systematically do things, like order blood tests or record immunization reminders. You may be able to use a similar system to keep track of who needs a followup and when.

2. **Determine methods to provide followup.**
   - The method by which you followup with a patient depends on what you need to followup on and your practice's capacity.
     - ◊ **Visit:** If a physician needs to physically examine the patient, a visit is the only means to do this.
     - ◊ **Phone call:** A phone call can save both the physician and the patient time. A phone call conversation can also be used to reinforce information provided to patients at their visits. Some insurance companies (and some patients) will pay directly for care provided over the phone.
     - ◊ **Automated call system:** Some practices may benefit from an automated system that enables patients to call in or receive calls to report health-related information (e.g., blood pressure, blood glucose), and get laboratory results.
       - ◊ These automated systems are often costly to implement, but large practices or practice networks may have the resources to purchase them.
       - ◊ For more information, refer to Automated Telephone Reminders: A Tool to Help Refill Medicines On Time.
     - ◊ **Followup forms:** Patients can be taught to record information at home and bring that record in at their next appointment. This is an example of a Followup instruction sheet for a diabetes patient. It is given to patients after a visit, and asks them to record blood glucose and call/fax/e-mail in their values by a specified date. This can be done for many different conditions.
     - ◊ **E-mail:** This can be a very efficient means of communicating to patients because it does not require that the patient and clinician are available at the same time. It is important to keep the following things in mind when using e-mail with patients:
       - ♦ Make sure patients know when or how often you return your e-mail, and stress that any life-threatening emergencies are not appropriate for e-mail.
       - ♦ E-mail communication may not be appropriate for relaying sensitive health and personal information. It may not be the most confidential means of communication.

- For more information on using e-mail see Enhancing Doctor-Patient Communication Using E-mail: A Pilot Study.

◊ **Mail:** Mailing normal lab results and reminders can be efficient for the office staff, and patients may appreciate knowing that their lab results were within normal limits.

- Use everyday language in written communications. Refer to Lab results letter.

3. **Identify who will do the followup.**
    - **Clinician:** If the followup is complex or sensitive, the clinician may prefer to provide followup over the phone. Consider a system for someone else on the staff to coordinate and perform the followup based on the needs determined by the patient or physician.
    - **Nurse:** Oftentimes nurses are in excellent positions to followup with patients. They have the training and expertise to review things like blood pressure and blood glucose values with patients, discuss and encourage specific health behaviors, and review medication adherence.
    - **Other office staff:** There may be opportunities for front desk staff or volunteers to contact patients for followup. Such followup could include scheduling appointments, confirming that patients followed through with referrals, and providing patients with information on community resources.

Track Your Progress

- **Assess need for followup.**
    - ◊ Have clinicians track how many patients would benefit from a followup contact and for what reason within a given week. This may help to identify demand for a followup system and what type of system is needed to address your needs.
- **Track the use of followup and its outcomes after a system is implemented.**
    - ◊ Assess the number of followup actions (phone calls, e-mails, letters, automated calls, etc.) performed by your practice within a week.
    - ◊ Note what is achieved by the followup contacts: medication changes, referrals made, clarification of medication regimens.