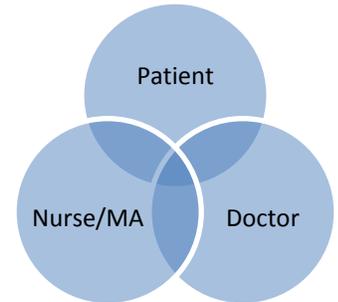


## Training: The Patient Overview Process

### The Patient Overview Process: 3 key components

1. **Pre-visit care coordination** using the Patient Overview Document, Nurse/MA chart review, phone call to patient & information collection for visit
2. **Patient Overview Huddle** to review the patient overview document
3. **Patient visit** using the Patient Overview Document



### What will you achieve from the Patient Overview Process?

- Improved efficiency & decreased duplicated work
- Increased physician awareness about the patient's agenda & needs for the visit
- Visit preparation for patients who require extra time in clinic (e.g., labs, tests, referrals)
- Avoid "hand-on-the-doorknob" issues

### **The Key to a Successful Patient Overview Process is Teamwork!**

#### Why is teamwork important in primary care?

- "During the 15-minute visit, primary care physicians cannot provide acute, chronic and preventive care while building meaningful relationships with their patients and managing the multiple diagnoses according to a whole host of evidence-based guidelines."

#### Key Characteristics of Effective Teams

- **Team leadership**
  - Direct & coordinate activities, assign tasks, help problem solve
- **Mutual trust**
  - Believing that team members will perform their roles
  - Trusting other team members intentions are good; willing to admit mistakes & accept feedback
- **Shared mental models**
  - Being on the "same page", having the same goal
  - Understanding the tasks to be done & how the team will interact
  - Anticipating & predicting each other's needs

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## Training: The Patient Overview Huddle

### What is the patient overview huddle?

- A brief “check-in” for the care team (the nurse/MA & the physician) to share highlights from the patient overview document & draw attention to important items or items requiring action
- An opportunity for the care team to come together to make sure they are on the same page – as in football



### What is my role in the patient overview huddle?

- **Nurse/MA:**
  - Provide an overview of the patient overview document information
  - Bring attention to items that need physician attention or follow-up & items for which additional information is available for the visit
- **Physician:**
  - Listen to the Nurse/MA presentation, ask questions, request additional information as needed
  - Work with Nurse/MA to have her complete work ahead of the visit to make visit easier



### Keys to a successful patient overview huddle

- The care team believes the huddle will be useful
- Set a time for the huddle: plan for it
  - Beginning of the session (preferred) or immediately before the visit
- Huddle at central location or a set location
  - At the nurse's station, in the physician's office
  - Stand together and review patient overview document
- Limit the time of the huddle to a couple minutes

### Overcoming barriers to a successful huddle taking place

- Creating awareness of the need to have a huddle that day
  - How will the nurse/MA remember that a patient overview patient is scheduled that day & a huddle needs to occur?
  - How will the physician know to be available for a huddle that day?
- Coordinating the timing of the huddle
  - How will the nurse/MA & physician find each other to meet up for the huddle?
    - Nurse/MA may be rooming other patients
    - Physician may enter patient room at start of session without being seen by nurse/MA

### For Discussion:

- What barriers exist to performing the pre-visit care coordination chart review & patient phone call?
- What (other) barriers exist to having the huddle?
- How can these barriers be overcome?

