Continuity Clinic Lab Follow-Up

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Background

• Consistent lab and study follow-up and patient notification are critical to ensuring excellence in patient care and for resident training in outpatient experience.
• Several different methods for follow-up are available and are usually left to the provider’s discretion.
• This, however, can lead to lapses in timely follow-up and can create strain on the ancillary clinic staff who must field phone calls and messages from patients.
• A standardized approach to follow-up therefore is needed to improve efficiency for our patients.
Ensuring that certain lab tests and imaging studies are performed has been less difficult and cumbersome since the advent of IMPACT.

• Clinic schedules are retrievable from months ago.
• Orders are placed and documented electronically.
• There is still room for error, especially for patients who do not have their labs and images scheduled on the day they are seen, as frequently happens in patients who present for their first visit without insurance or charity care.
• A uniform approach to reminding providers will assist in these lapses.
Expectations

• Improve patient satisfaction by detailing expected means of receiving lab and imaging results, as well as changes in medication or further follow-up

• Uniform means of communicating with patients by providers will decrease patient calls and lighten load for ancillary staff

• Timely follow-up will be well-documented in the medical record in the event of future medico-legal complaints
Reminder Options

• Setting reminder function in Impact for all lab and imaging studies
  – Does not solve the problem of actually having time to review results
  – Adds extra step
  – May be beneficial when ordering tests on patients who return later for testing due to funding issues
• Paper follow-up sheet filled out at time of order and filed in clinic cubby.
  – Adds extra step
  – Does provide physical reminder of tests ordered
Documentation

• For normal lab values, a communication note is adequate
  – A phone note that you called the patient
  – A note to clinic staff to call the patient
  – When the patient web portal becomes available, this may be changed

• For abnormal lab values, a brief chart note or addendum to the previous clinic note is preferred
  – It is more easily found for other physicians reviewing the records
  – It allows you to document any discussion with an attending and subsequent plan
Patient Notification

• For normal lab results, options include
  – Resident calls patient
    • Serious interference with other clinical duties
    • No added benefit to patient care for physician to make normal results calls
  – Clinic staff calls patient
    • Additional work on an already overburdened staff
    • Might reduce patient calls received with timely notification of results
    • Adequate documentation must be ensured
  – Clinic staff sends results letter
    • Additional work on an already overburdened staff
    • Might reduce patient calls received with timely notification of results
    • Adequate documentation must be ensured
    • Cost
  – Patient web portal
    • Not available yet
    • Upfront instructions to patients on use
    • Some of our patients may lack internet access
    • Adequate documentation must be ensured

• For abnormal results, a call from the resident will still be the preferred option
General Issues

• Method and timing of follow-up should be discussed with patient at the clinic visit. Notifying the patient of your availability for calls should help cut down on frequent patient calls at inopportune times

• Patient contact info and pharmacy should be confirmed by the clinic staff at each clinic visit and with any patient calls

• Cooperation with clinic staff regarding uniform method of follow-up

• Diligence of follow-up and appropriate means of communicating with patients by residents
Message Center

Click here for Results
Click here to create letter or reminder.

Results

Endorse results as reviewed.
Forward to RN/Staff; comments will not be saved in chart.
Reminder Messages
Reminder

Reminders
Comments not saved in chart.
For patients with no working phone number.
Patient Salutation
Can free-text in letter re: results. Labs autopopulate, but bx/pap/imaging studies do not appear as results.
Letter Preview

Select do not print and send to staff to review and mail.
Endorse Results

Can forward to RN to review, but comments won’t be saved.
Results

Click on order history to see if/when reviewed.
Communication Messages

Create message for staff.
Always save to chart.
SOUTH-SHIELDS, MARLENE

Age: 57 years
DOB: 10/02/1955
Sex: F
Weight: 85 kg
Blood Type: O
MAR: 000001517311
Loc: KMRI
Fin#: 5377533854

Message-Saved to Chart

From: Darst, Jennifer Katherine MD
To: Darst, Jennifer Katherine MD
Sent: 03/07/2013 15:46:04 CST
Subject: Phone Message

Reason for call:
Please call re: normal biopsy/mammogram results.
**Addendums**

**SOUTH-SHIELDS, MARLENE**  
Age: 57 years  
DOB: 10/02/1955  
Sex: F  
Blood Type:  
Weight: 58 kg  
Loc: KMRI  
Fln# 5377533954  
MRN: 0000001517911  
1 Time OP [02/28/2013 14:00 - No - Discharge d  
Resus Status: Full Resuscitation  

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**Emergency**  
11/11/2011  
L/V/L2 MED...  
Signs And -  
Clinic Notes 10/09/2011...  
Progress K/E, Shann., Mar...  
Clinic Notes 09/28/2011...  
Cine Fieber... Shann., Mar...  

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**RTC pin**

Note updated to include labs, overall stable. Called patient with results. Overall patient is doing well but is complaining of left chest and wants medication for that as well as for sleep. Discussed we will get extended BP. Called by SSR, placed on normot when BP got to 305/190 and reports no effect on insomnia, FS is still quite depressed has referral to Opiate. Gave her curved prescriptions again today. Not inclined to start amni- 

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**Signature Line**

[Electronic Signature on 12/30/2012 05:01 PM]

Duraz, Jennifer Katherine MD  
(Modified on 12/31/2012 11:31 AM)  
Duraz, Jennifer Katherine MD  
(Co-Signed on 12/31/2012 11:31 AM)  
Duraz, Jennifer Katherine MD  
(Co-Signed on 01/08/2013 09:11 PM)  
Zinkan, Angela ND  
Zinkan, Angela ND