Pre-Visit Planning

What is Pre-Visit Planning?

Pre-visit planning is a process used in healthcare to ensure that the provider and member make the best use of the visit or service delivery time. It assists in smoothing out the visit to be able to focus on what matters most to the member while they are in front of the provider. The main goal of pre-visit planning is to deliver quality, efficient member care.

In some instances, a huddle is used for pre-visit planning. The care team gathers and discusses each member that is being seen that day and what needs are outstanding and what needs to be accomplished.

Why is Pre-Visit Planning Important?

Reviewing the member's chart ahead of time allows a provider to identify any gaps in care such as lab draws, preventative care and referrals and to confirm the status of the member's clinical quality measures. A review will also reveal whether the patient has seen another provider or been to the hospital or ED. The review allows a provider to confirm that care is coordinated across all providers and ensures a whole-person approach before the member presents for the visit.

Pre-visit planning shifts the visit from being reactive to being proactive and lead to more positive clinical outcomes.

How to Approach Pre-Visit Planning

The steps below allow for preparation for a member visit:

- Set the next appointment at the conclusion of each visit.
- Order any referrals or lab tests to be done at the current visit - to be completed by the next visit.
- Remind the member of the appointment.

Continued

Day of visit or afternoon before visit:

- Assign one of the team members to review the list of scheduled appointments.
- Review the last note written by the provider to look for any orders or recommendations for the member.
- Make sure results of orders - lab tests, referrals are in the medical record.
- Use a checklist or technology to identify gaps in care - this may include physical healthcare needs such as preventative screenings or immunizations.
- Prepare the chart for the provider to order any outstanding tests, referrals, etc and/or use the technology to provide alerts for the provider.
- Communicate in a huddle with all team members the daily schedule and any outstanding tasks before the members arrive for the appointments.