CARE TEAM AND WORKFORCE GUIDE RESOURCE 6: WORKFLOW EXAMPLES

FIGURE 6.1: PRE-VISIT PLANNING

MP PRE-VISIT PLANNING (PVP) WORKFLOW EXAMPLE

Prior to Scheduled Appointment

MA initiates PVP activities for their assigned PCP 1-3 days prior to appointment

Utilizing the PHM Platform, the MA will complete the PVP checklist, including documenting:

- Reason for Patient visit
- Transportation needs
- Interpretation services needed
- Cultural, faith-based, or LGBTQIA+ preferences for care
- Type of exam/room readiness needs
- Supplies needed for patient/procedure
- Lab/imaging
- Recent ED/hospital records
- Vital signs to be obtained/charted
- Assessments due
- Immunizations
- Health maintenance activities
- Prenatal/post partum care

As able, the MA will support PVP activities including ordering labs/health maintenance activities per the organization's Standing Order policy/procedures.

Day of Appointment

Conduct morning huddle, utilizing PVP checklist (pg. 20 in Care Teams IG) to communicate important information and outstanding tasks that need to be addressed by the PCP

Discussion Questions

- Who is conducting PVP?
- Is it happening consistently?
- What IT systems are used to complete?
- When is it done?
- Are there standing orders in place to support PVP/ ordering of labs/health maintenance activities?

End of Current Visit

Prior to checkout, preorder needed labs/ screenings needed for next visit

Schedule follow up appointments and support referral management

Provide patient education and ensure patient is aware of any interventions or patient-directed activities needed prior to the next appointment

FIGURE 6.2: POINT OF CARE

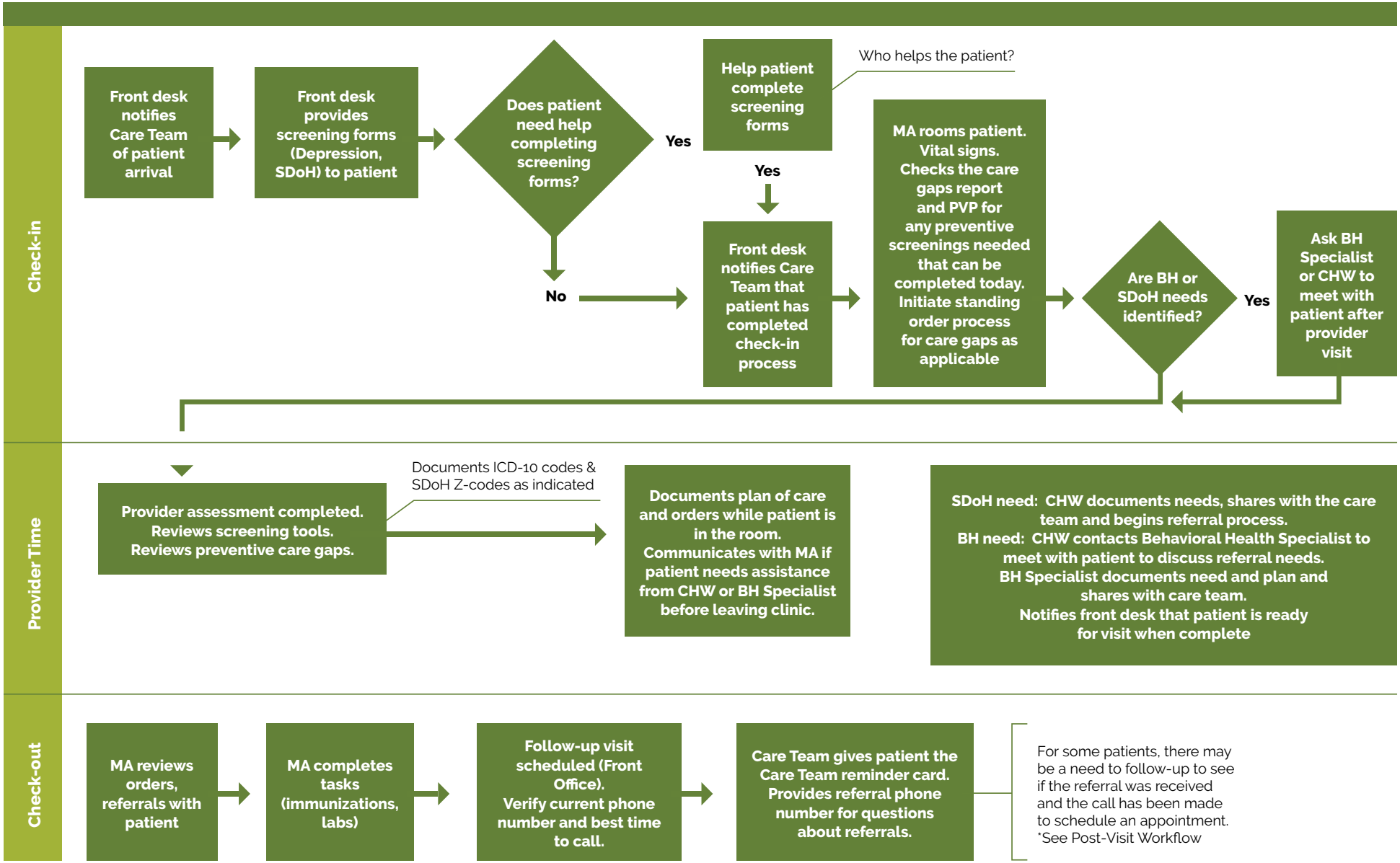

FIGURE 6.3: SCHEDULED VISIT PREVENTIVE CARE VISIT WORKFLOW

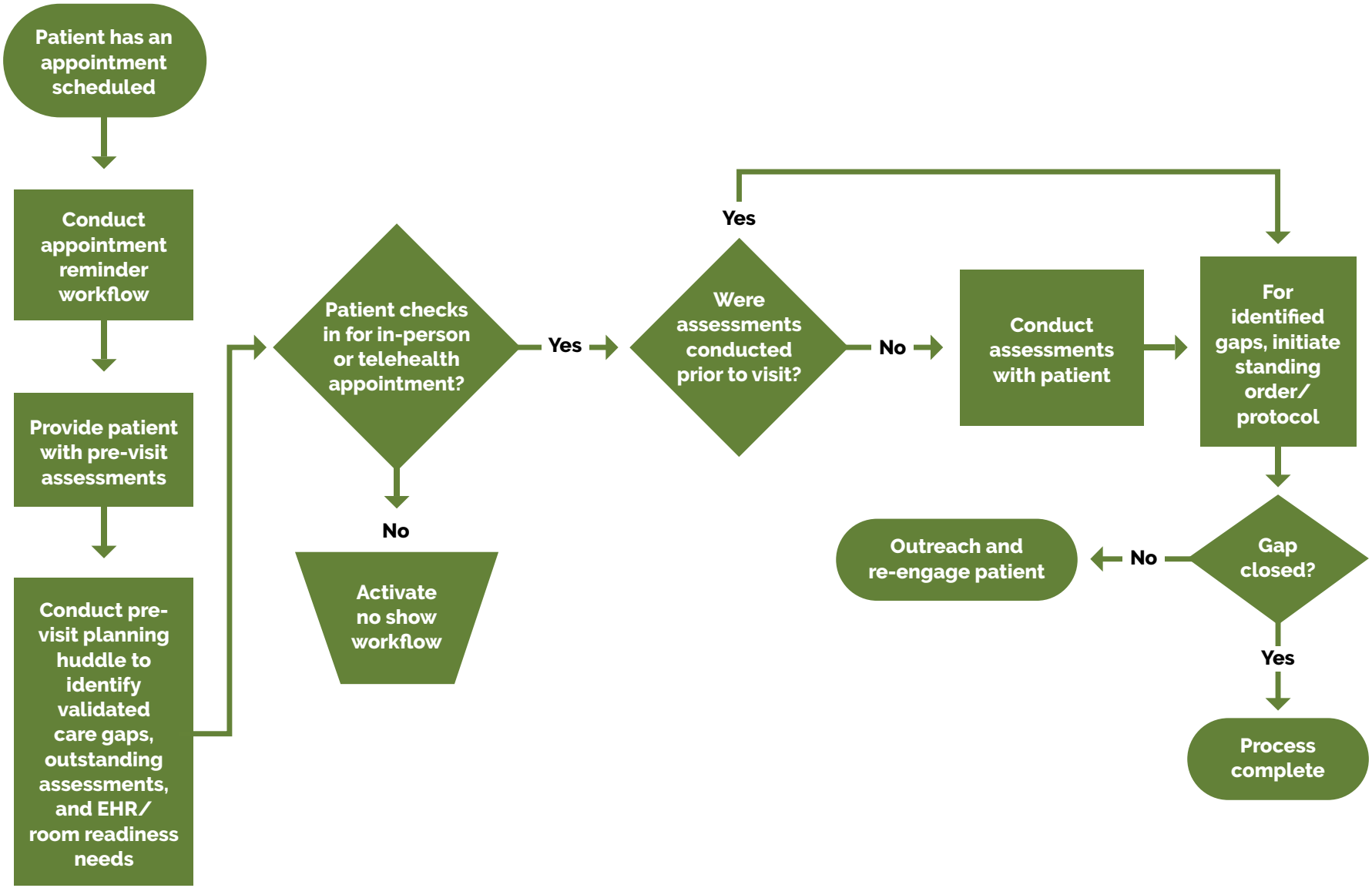

FIGURE 6.4: SCHEDULED OFFICE VISIT WORKFLOW

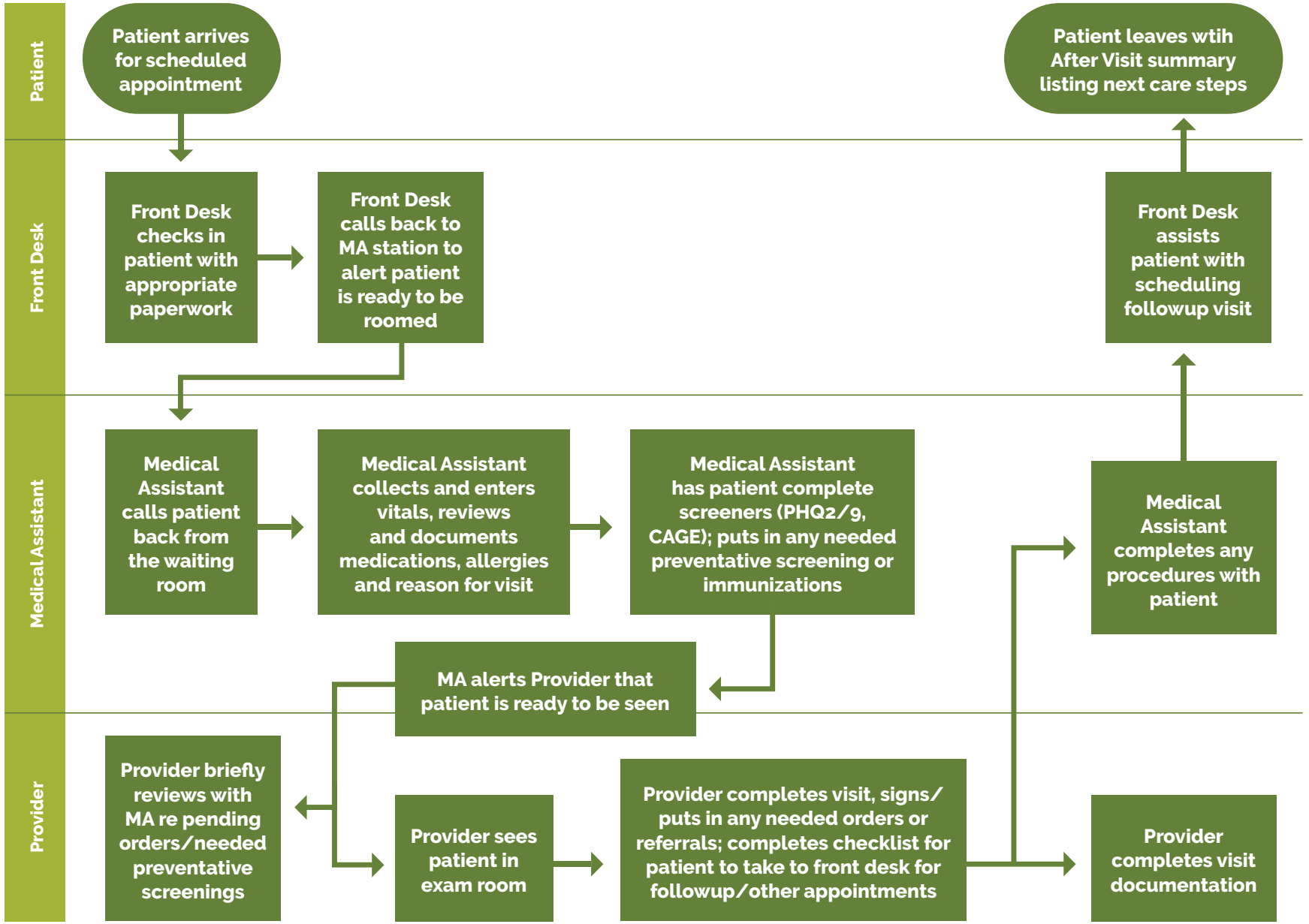

FIGURE 6.5: POST-VISIT FOLLOW UP

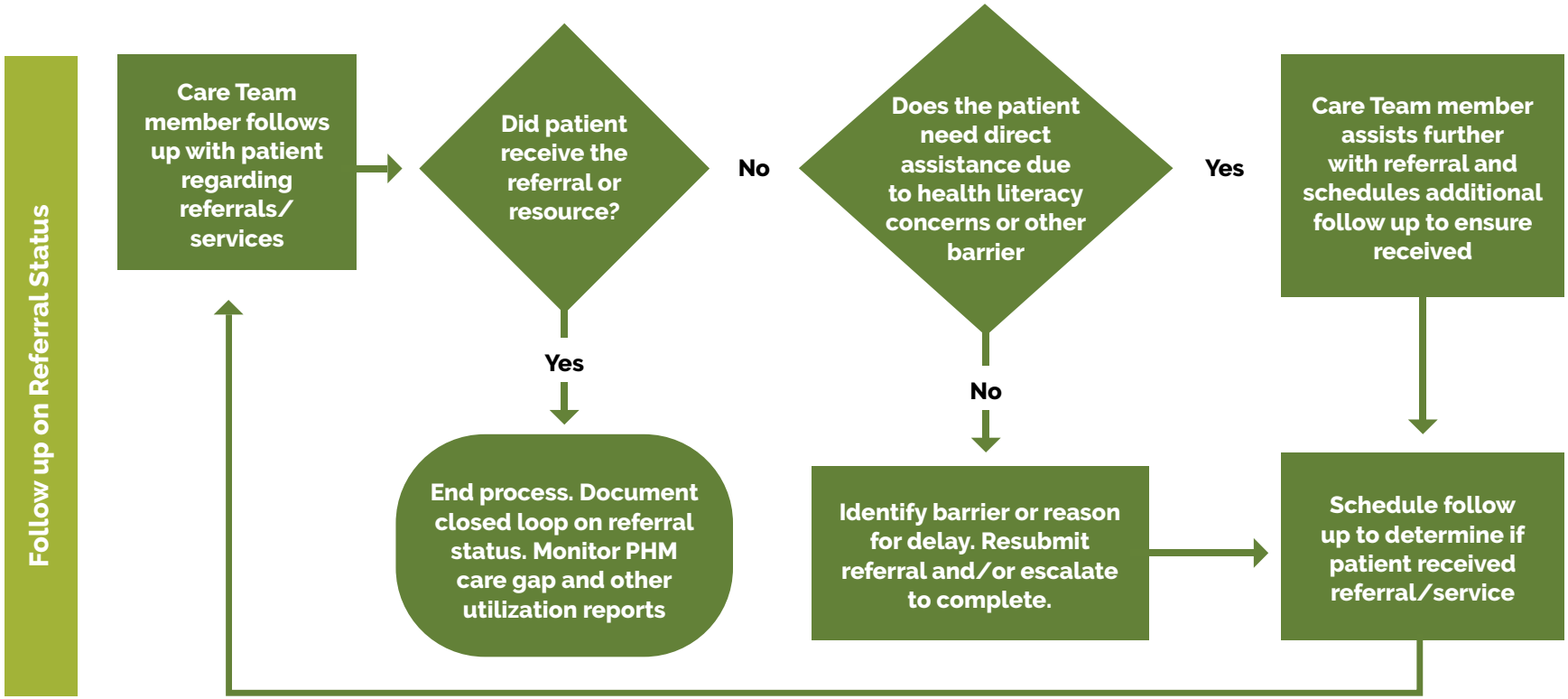

FIGURE 6.6: PROACTIVE OUTREACH & ENGAGEMENT EXAMPLE