



Quality Care Through Follow-Up



**Presented by,
Tressa Sacrey
Director, Compliance & Education
Health Services Associates, Inc.**





Objectives:

Participants will:

- Review the 4 key areas of follow-up within the clinic
- Discover tools the clinic can use to measure success
- Discuss the documentation expectations at time of survey

4 Key Areas of Follow-Up:



- **Laboratory services**
- **Consultative services**
- **No-show appointments**
- **Return visits**



4 Key Areas of Follow-Up:



Laboratory services:

- **Provider order**
- **Labs drawn**
- **Results received**
- **Provider review**
- **Results to patient**



4 Key Areas of Follow-Up:



Consultative services:

- **Provider order**
- **Pre-authorization**
- **Scheduled with specialist**
- **Consultative note brought back into patient record**



4 Key Areas of Follow-Up:



No-show appointments:

- **Process in policy**
- **Documentation in record of actions taken**



4 Key Areas of Follow-Up:



Return visits:

- **Acute visits**
 - PRN (as necessary)
- **Chronic visits**
 - Provider request
- **Preventative visits**



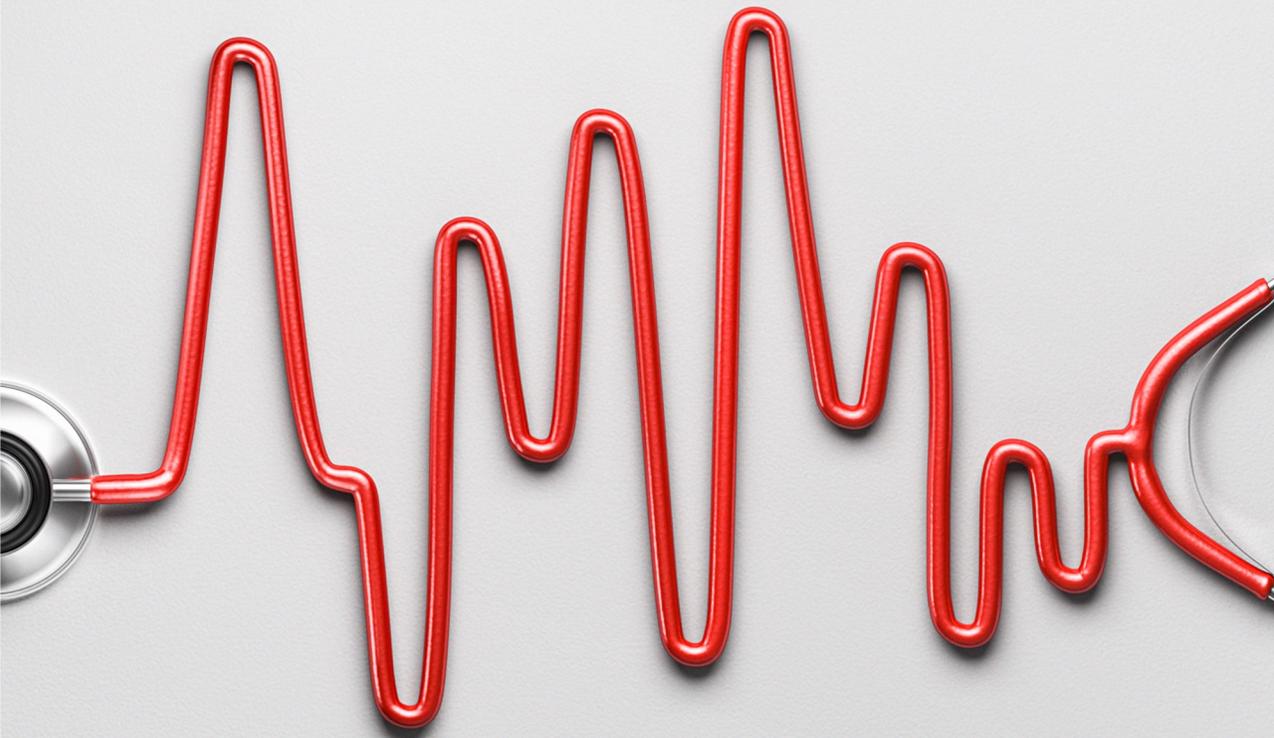
DON'T FORGET:



New Medications

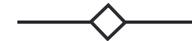
- **Documentation of administration or prescription**
- **Education documented about adverse reactions**

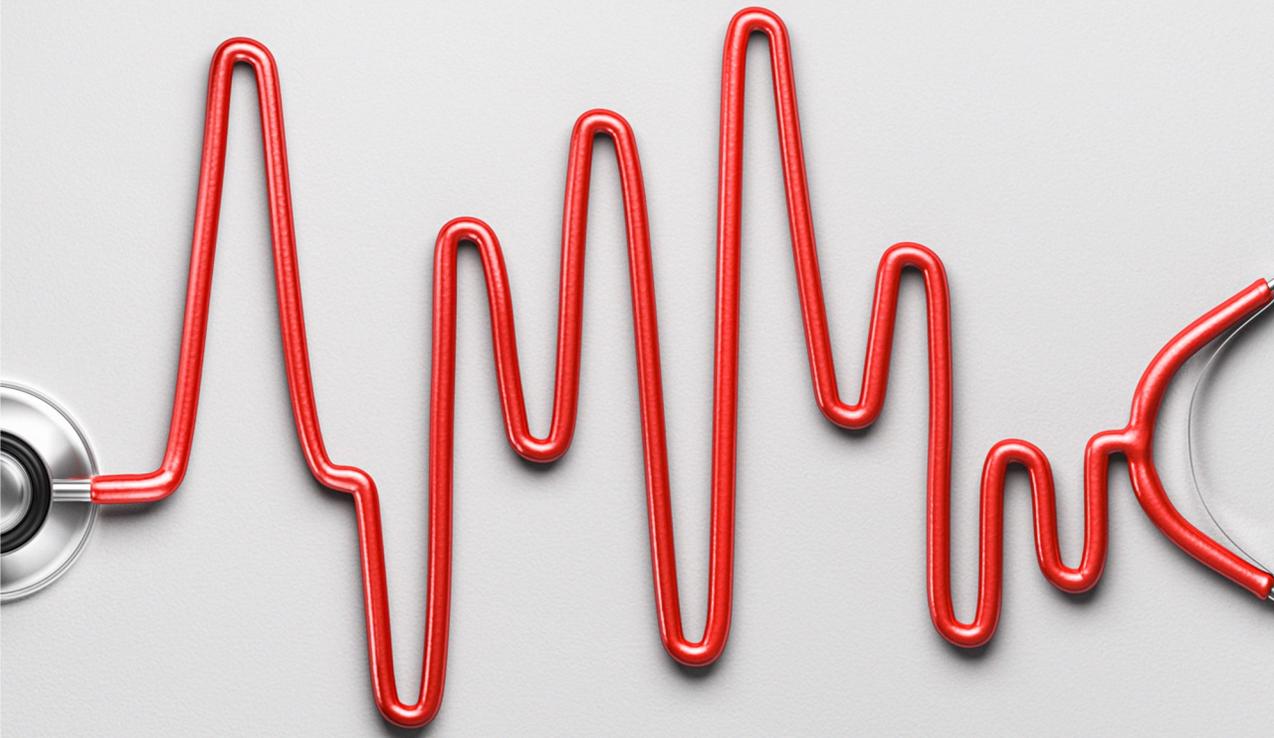




Roadblocks

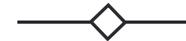
- **Schedule availability**
- **Staffing levels**
- **Policy development**
- **Non-compliance**

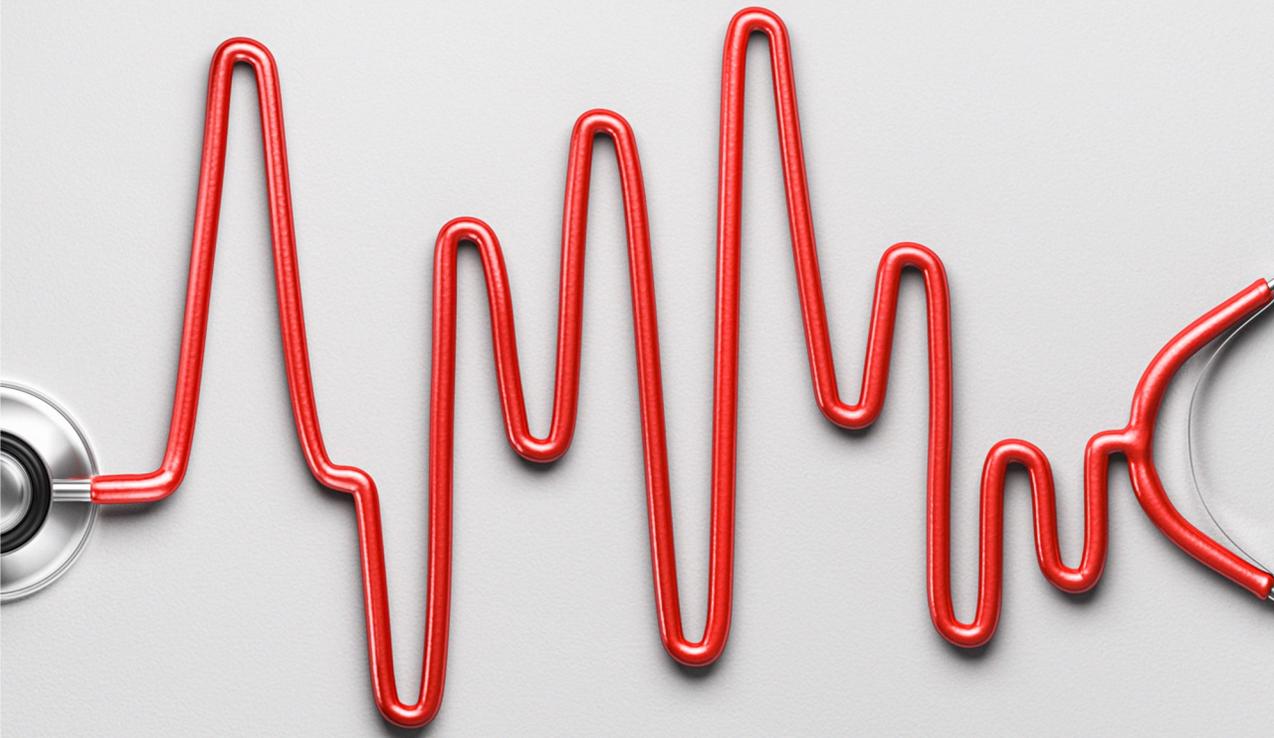




Safety Nets

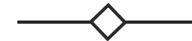
- **Medication refills**
- **Tracking tools**
- **Chart audits**
- **Staff training**

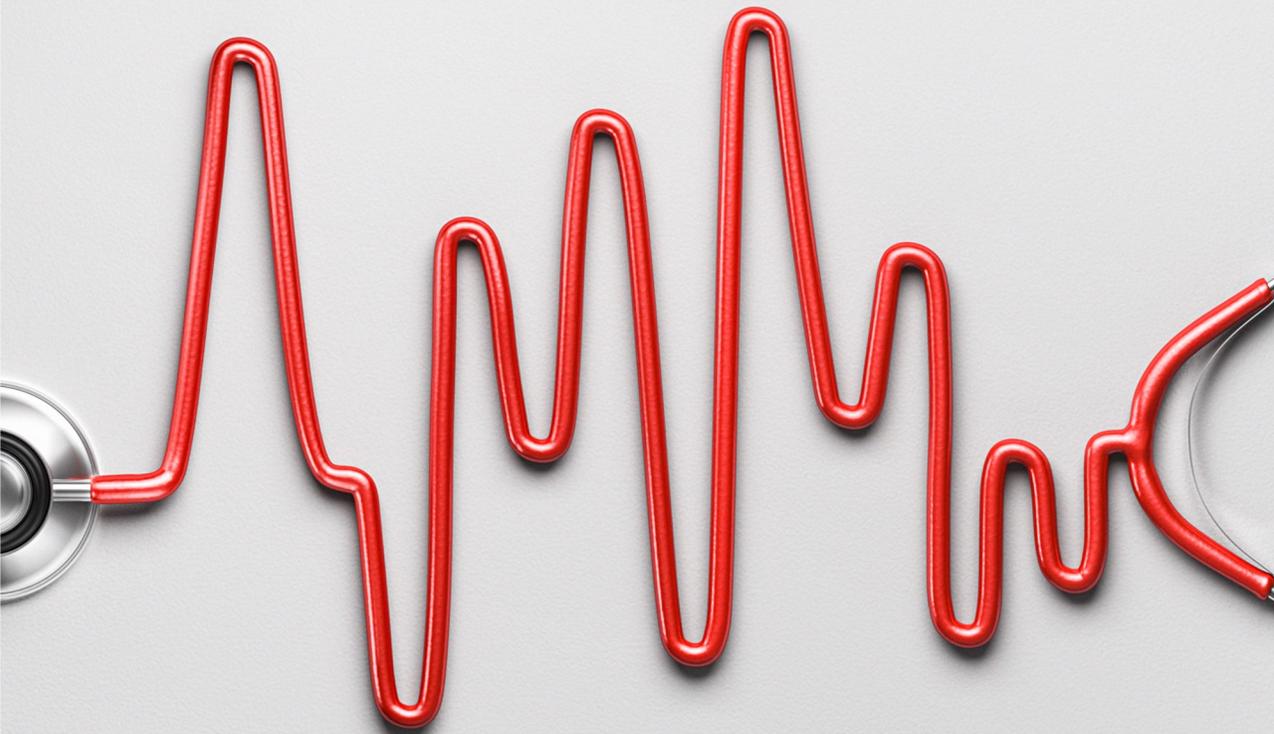




Common Findings

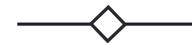
- **Results not sent to patient**
- **Follow-up appointment not scheduled**
- **Tracking system not established**

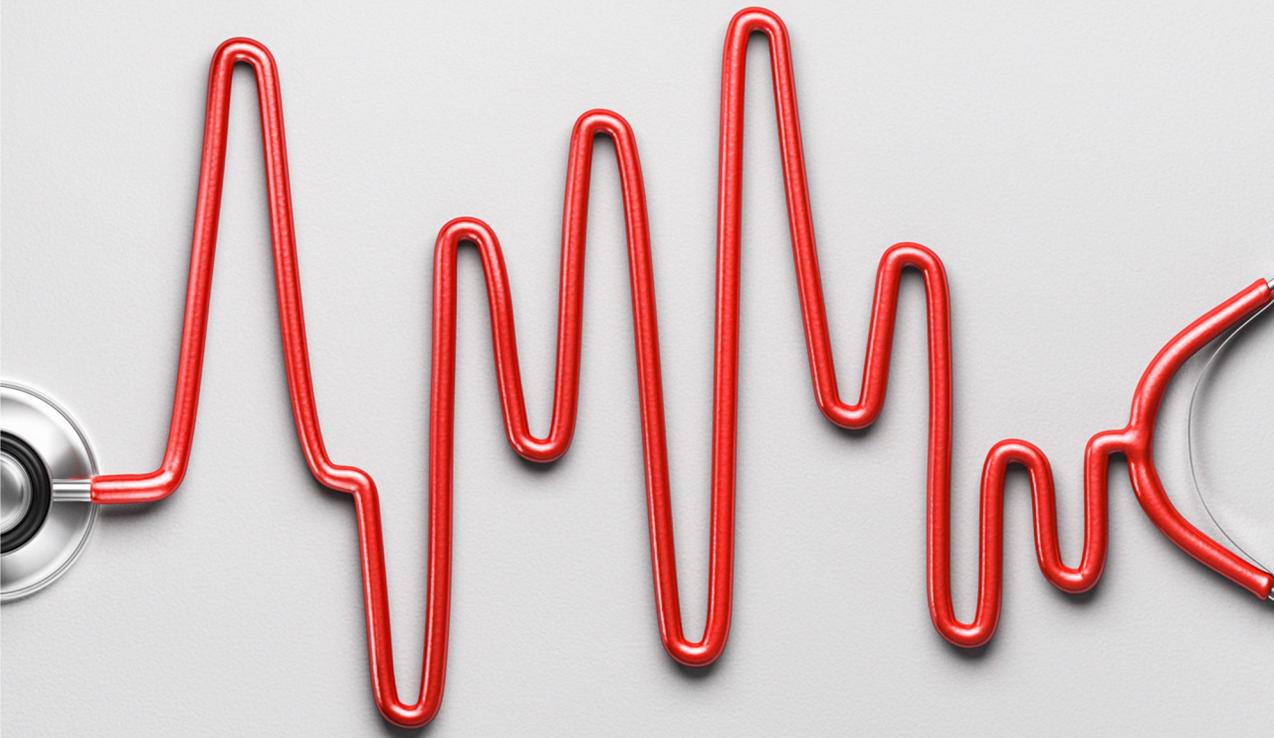




Helpful Tips

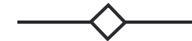
- **Administrative Chart Audits**
- **Spreadsheets**
- **Referral Coordinator**
- **Chronic Care Management (CCM)**





Documentation

- **Notes in record of all communication**
- **Patient portal**
- **Patient summaries**



Patient Chart Audit

Name of Clinic:

Date Reviewed:

Prepared by:

Reviewer:

Practitioner	Date of Service	Account Number	Chief Complaint	Consent	Social Data	H&P	Provider Signature	Labs Signed	Treatment Reports	Instructions to Patients	Evidence of Follow-up	Med. List	Allergies	Comments
1														
2														
3														
4														
5														
6														
7														
8														
9														
10														

1

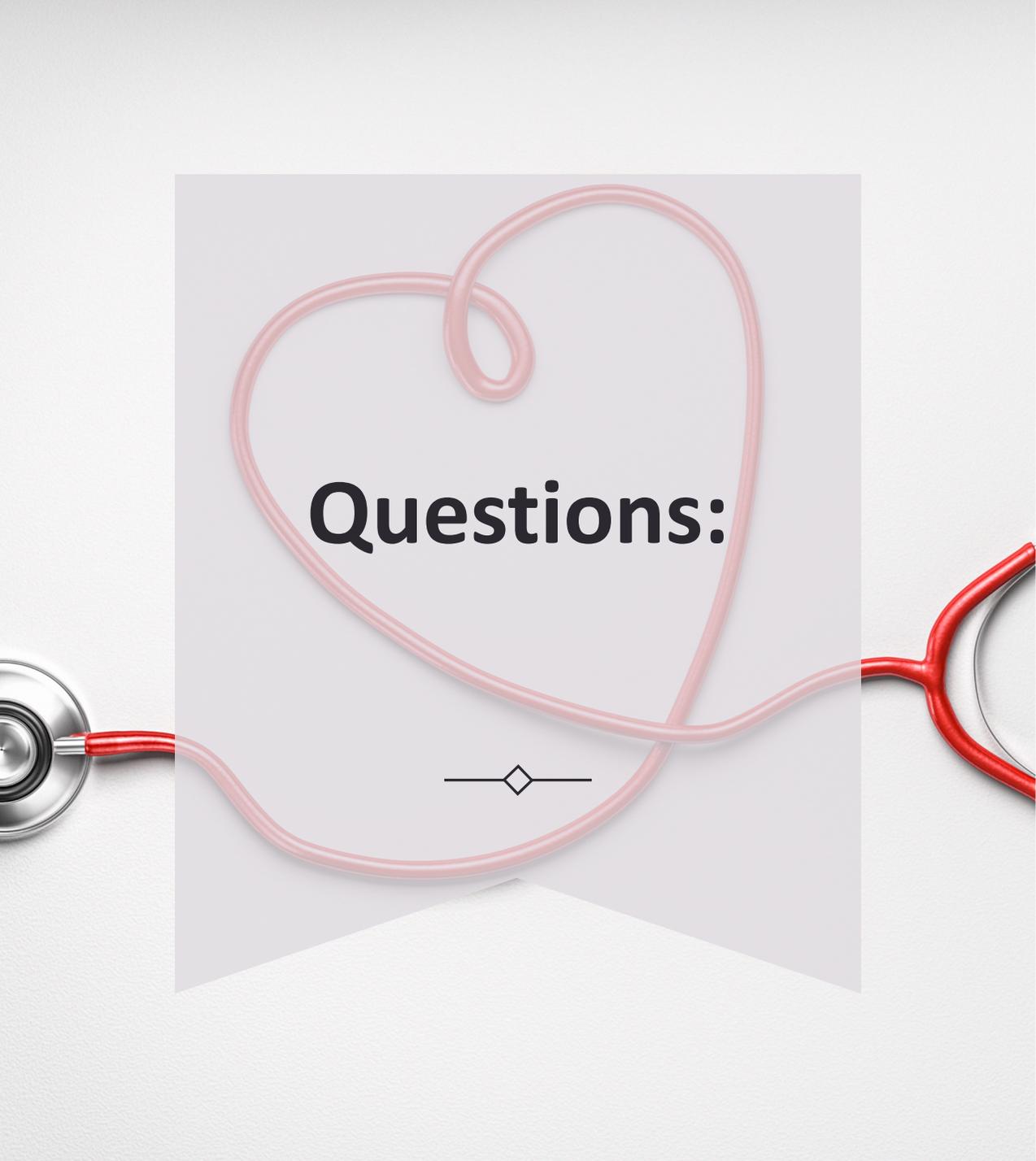
2

3

4

5

6



Questions:

Tressa Sacrey

Director, Compliance & Education

Health Services Associates, Inc.

tsacrey@hsagroup.net

www.hsagroup.net