A Checklist Approach to the After Visit Summary: Improving Patient Comprehension of the Plan

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**AIM STATEMENT**

- Assess and improve patient understanding of their visit care plan by creating a Visit Summary Form (VSF) for an ambulatory internal medicine practice

**BACKGROUND**

- Giving clinical summaries to patients is a Center for Medicare and Medicaid Services Meaningful Use of Electronic Health Records
- Clinical summaries are defined as After Visit Summaries which provide a patient with "relevant and actionable information and instructions"
- Patient plans of care can be complex and include multiple items across various domains, which can be challenging to recall and therefore act upon

**OUTCOMES**

**Profile of Acute Visits (n = 12)**
- Labs: 18%
- Imaging: 4%
- Medications: 43%
- Follow-up: 0%
- Lifestyle: 21%
- Referrals: 11%
- Vaccines: 3%

**Profile of Annual Visits (n = 17)**
- Labs: 12%
- Imaging: 10%
- Medications: 22%
- Follow-up: 9%
- Lifestyle: 31%
- Referrals: 9%
- Vaccines: 9%
- Lifestyle: 31%
- Follow-up: 9%
- Referrals: 9%
- Vaccines: 9%

**CONCLUSIONS**

- Assessed patient recall and understanding of their plan of care following acute and annual physical visits
  - **Acute visits**, on average, had 2.4 elements / plan
  - **Annual visits**, on average, had 6.5 elements / plan
- Categories patients best reflected their understanding of care: follow-up visits, labs, and imaging. Possible explanations include:
  - Scheduling future appointments at the clinic front desk is a routine engrained in the patient experience
  - Lab and imaging orders are physically printed for patients in the clinic which could serve as a reminder of tasks to accomplish after the visit
- Categories patients did not recall as well: vaccines and lifestyle modifications. Possible explanations include:
  - Patients receive vaccines relatively infrequently
  - Patients might perceive lifestyle modifications as "softer" elements of their care plan compared to medication management
- As complexity of care plans increases, as defined by an increasing number of elements, patient recall decreases

**DISCUSSION**

- Patient Awareness vs. Plan Complexity (n = 29)

**INTERVENTION**

- Designed a care plan template to be completed throughout the visit and given to patients will all elements of their medical plan included
- Teach-back method was used to open-endedly assess patient recall of their plan immediately following the visit

**FUTURE STEPS**

- Future work can investigate a correlation between patients' early understanding of their plans and ultimate adherence