

LT Jerry Bradley, MD (Lead Project Physician), HM3 Gavin Strong (Lead Project Corpsman) CAPT(sel) Paul Allen (DBC, Champion)
Naval Branch Health Clinic Port Hueneme

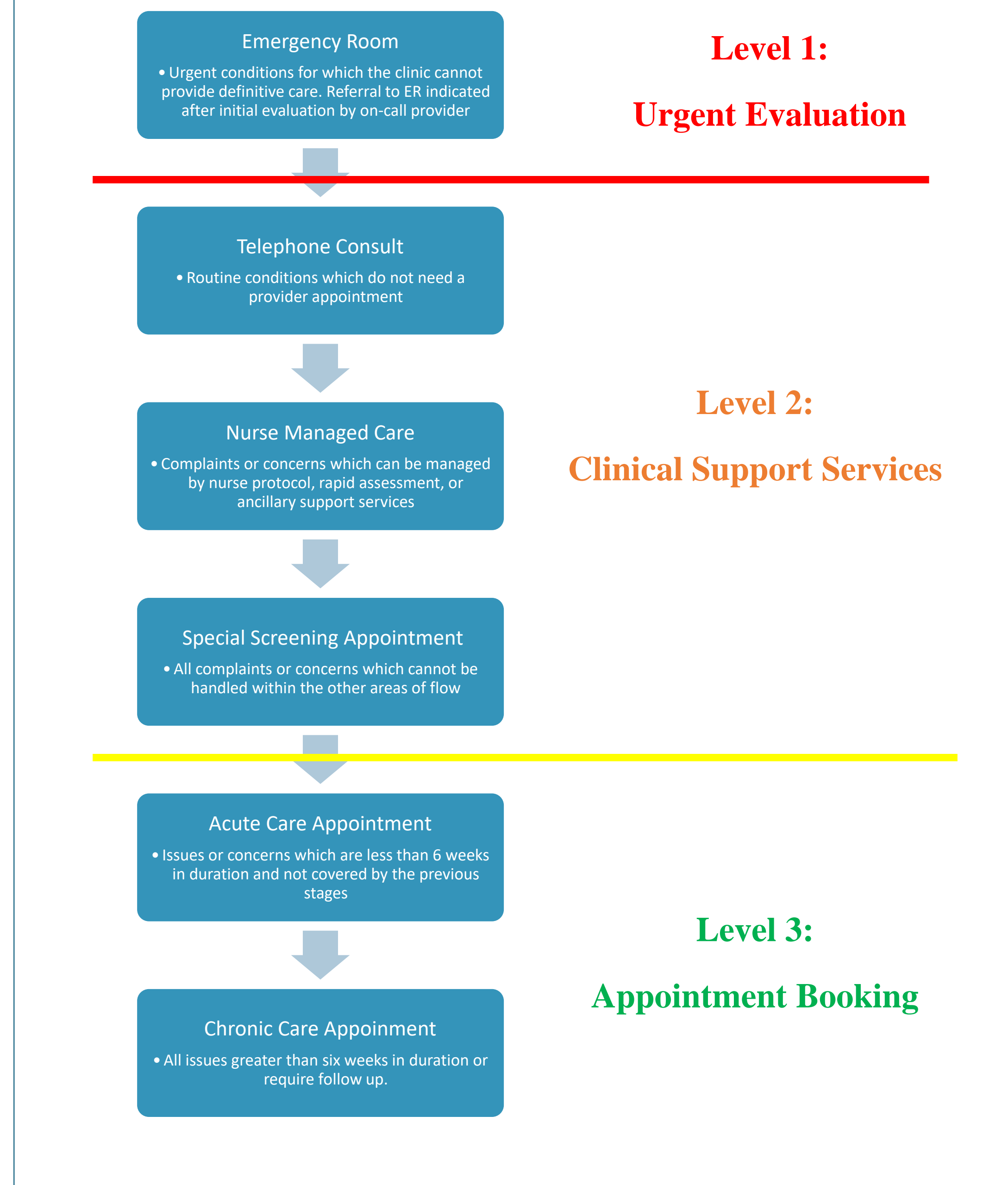
Plan – The Problem

Appointment booking is a critical process in order to provide patients with the best possible care. Within the outpatient clinic we found the following issues:

- No consistent standard for booking
- Limited utilization of ancillary resources
- No screening for nurse managed clinics
- No pathways for ER visits or consults
- Poor communication between booking staff, providers, and nursing
- Reduced access due to unnecessary appointments

Do – Creating the Process

The SORT process re-developed the booking guidelines to ensure patients were scheduled with the best possible resource for their care. The new process consisted of three levels of access through which the patient would fall based on their level of need:



Quick Reference Guide

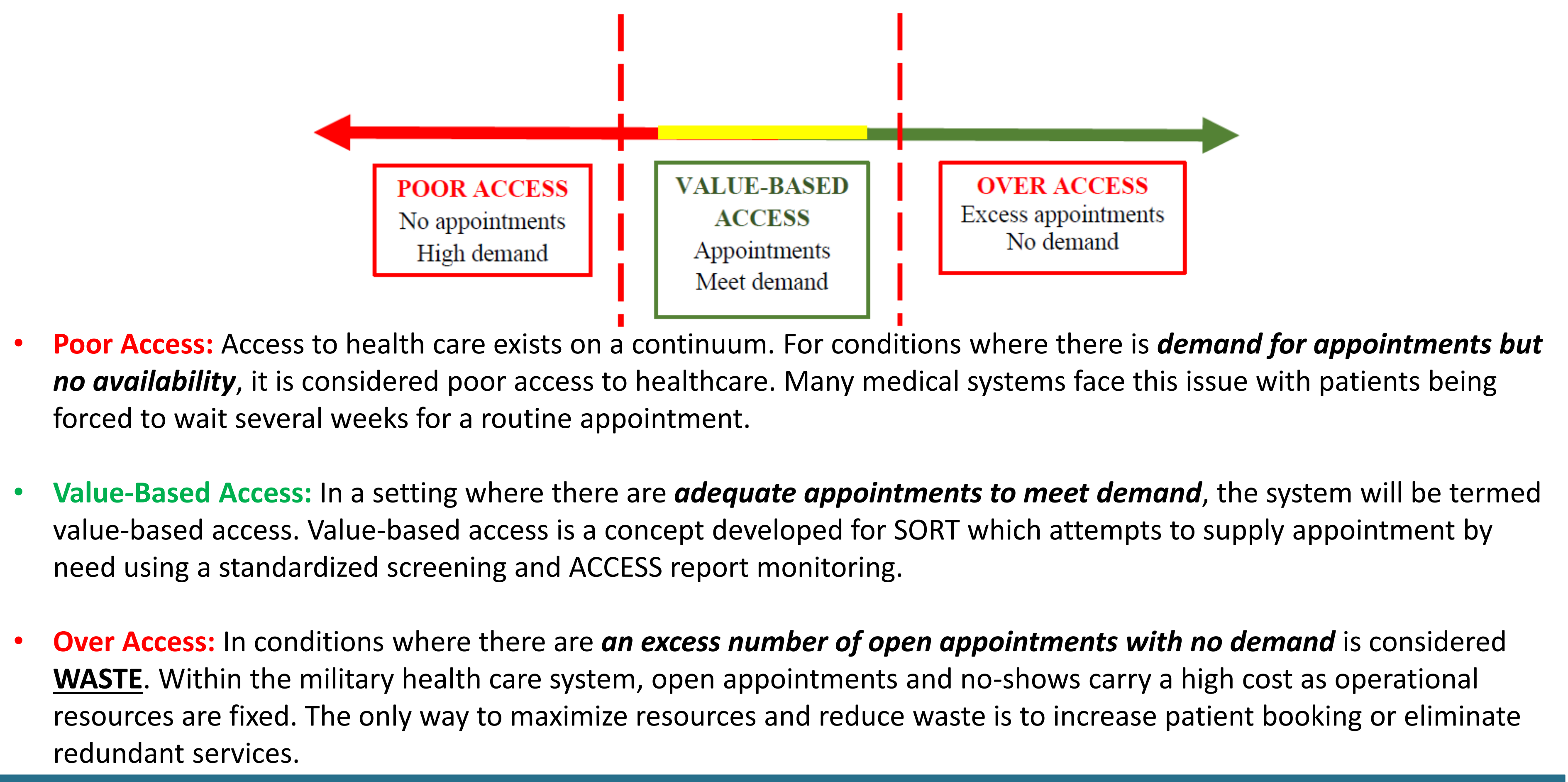
QUICK REFERENCE GUIDE
STANDARDIZED OPERATIONAL RESOURCES FOR TRANSITION

<p>LEVEL I: URGENT EVALUATION</p> <p>PROVIDER EVALUATION</p> <p>ACTION: If IN PERSON these patients should be immediately evaluated by the "provider of the day". If ON PHONE these patients should be referred to the nearest ER or 911.</p> <ul style="list-style-type: none"> Abdominal pain (acute, severe) Chest pain (acute onset, history of heart disease) Foreign body Ingestion / Poison exposure Seizure or Seizure-like episode Shortness of breath (acute) Pregnancy complications (acute bleeding, pain) <p>IMPORTANT: Alert the doctor of the day or the nurse about any patients who may be in harm, crisis, or have other acute needs which requires urgent attention.</p>	<p>LEVEL II: CLINICAL SUPPORT SERVICES</p> <p>TELEPHONE CONSULT</p> <p>ACTION: These conditions should be referred by T-CON to the patient's primary care manager's nurse</p> <ul style="list-style-type: none"> Lab/imaging results Mammogram referral Referral renewal (NOT initial consult) WIC paper work Vasectomy Medication refill Birth control ER follow up report Handicap placard Colonoscopy Pre-operative <p>NURSE MANAGED PROTOCOL</p> <p>ACTION: These conditions should be referred to the Nurse Managed Protocol for rapid assessment.</p> <ul style="list-style-type: none"> Urinary Tract Infection (UTI) Upper respiratory infections (colds, coughs, flu) Pregnancy Counseling Lice Blood Pressure Sexually Transmitted Infection screening (STI) Pregnancy testing <p>SPECIAL SCREENING</p> <p>ACTION: These appointments can be booked ONLY by their respective screening office. Patient MUST have paperwork completed and approved by that office prior to visit.</p> <ul style="list-style-type: none"> Overseas screening (OSS) Annual Physical Health Assessment (PHA) Individual Augment (IA) EFMP (initial, referred to office) Special duty physical/screen Medical Records Request 	<p>LEVEL III: APPOINTMENT BOOKING</p> <p>24 HOUR (ACUTE CARE) APPOINTMENT</p> <p>ACTION: Conditions or illness which have been on-going for less than 6 weeks.</p> <ul style="list-style-type: none"> Wound care/dressing change PFB/No shave waiver Acute infections (not covered by nurse protocol) All other acute (< 6 weeks) conditions <p>ACUTE BOOKING ORDER: Book with PCM first. If acute and PCM not available, active duty should see IDC. All other patients should be booked into an open appointment on the SAME team as the patient's PCM.</p> <p>FUTURE (CHRONIC CARE) APPOINTMENT</p> <p>ACTION: Chronic conditions are those for which the patient has had for over 6 weeks or was previously evaluated by that provider.</p> <ul style="list-style-type: none"> Initial referral LIMDU initial and follow up PRT/PARFQ Separation physical consult VA physical Sports physical School physical Medical board <p>CHRONIC BOOKING ORDER: All chronic appointments MUST be booked with the patient's PCM at their next available opening NOT in an acute appointment unless the patient has an urgent/critical need or concern.</p>
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GENERAL APPOINTMENT GUIDELINES

ACTION STEPS: Be sure to reference the full guide for how to refer and book for each of the conditions/concerns listed in each step.

Value Based Care Modeling (Check and Act)



Pilot Testing – The Levels of Care

<p>LEVEL 1: URGENT EVALUATION STANDARDIZED OPERATIONAL RESOURCES FOR TRANSITION</p> <p>IMPORTANT: Patients presenting IN PERSON with urgent medical conditions should be immediately evaluated by a nurse or "provider of the day". If you have concern regarding the patient's complaint, do not book an appointment. Seek approval by a nurse or provider to ensure the patient does not need an urgent evaluation. Patients presenting BY PHONE should be directed to the nearest ER or call 911</p> <table border="1"> <thead> <tr> <th>Complaint</th> <th>Concerning Symptoms</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Abdominal Pain</td> <td> <ul style="list-style-type: none"> Pain is urgent if it is: <ul style="list-style-type: none"> Severe Sudden onset Associated with intense nausea and vomiting Occurred after trauma </td> <td> <ul style="list-style-type: none"> If in clinic <ul style="list-style-type: none"> Move to treatment room Alert provider and/or nurse If on phone <ul style="list-style-type: none"> Ask patient to go to the nearest ER </td> </tr> <tr> <td>Chest Pain</td> <td> <ul style="list-style-type: none"> Pain is urgent if it is: <ul style="list-style-type: none"> Sudden onset Associated with shortness of breath Palpitations Shoulder or jaw pain History of prior heart attack </td> <td> <ul style="list-style-type: none"> If in clinic <ul style="list-style-type: none"> Move to 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Inform the patient that the nurse will contact them in 48 to 72 hours to follow up on the request. Be sure to follow proper T-con protocol for each request.</p> <table border="1"> <thead> <tr> <th>Complaint</th> <th>Directions and/or Conditions</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Medication Refill</td> <td> <ul style="list-style-type: none"> Patient must have been seen by provider within the past 6 months Patient must not have any issues or </td> <td> <ul style="list-style-type: none"> Create T-con to send to the patient's PCP's nurse Include the following in the T-con </td> </tr> </tbody> </table> <p>LEVEL 2: CLINICAL SUPPORT SERVICES STANDARDIZED OPERATIONAL RESOURCES FOR TRANSITION</p> <p>TELEPHONE CONSULTS</p> <table border="1"> <thead> <tr> <th>Complaint</th> <th>Directions and/or Conditions</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Birth Control</td> <td> <ul style="list-style-type: none"> IUD, Neuplan <ul style="list-style-type: none"> Require nurse to book appointment Oral contraceptives <ul style="list-style-type: none"> Can be refilled like standard medication refill Depo <ul style="list-style-type: none"> Follow DEPO SOP from immunizations Plan B <ul style="list-style-type: none"> Send to pharmacy (no T-CON required) </td> <td> <ul style="list-style-type: none"> Create T-con to send to the patient's PCP's nurse Order pregnancy test Order Depo (as required) Include the following in the T-con <ul style="list-style-type: none"> Specify type of contraceptive Any complication/concerns patient may have with therapy </td> </tr> <tr> <td>ER Follow Up Report</td> <td> <ul style="list-style-type: none"> Patient does not require follow up and wishes to update PCM and medical record about recent ER visit </td> <td> <ul style="list-style-type: none"> Create T-con to send to the patient's PCP's nurse Specify name of ER patient went to obtain records (if patient does not provide) If patient provides full ER report, scan into HAMIS and send T-CON to nurse </td> </tr> <tr> <td>Handicap Placard</td> <td> <ul style="list-style-type: none"> RENEWAL only. 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Handicap Placard	<ul style="list-style-type: none"> RENEWAL only. New placard will need an appointment for full evaluation 	<ul style="list-style-type: none"> Create T-con to send to the patient's PCP's nurse Fill paperwork under patient's name on the appropriate team for nurse to retrieve 																																																																																																						
Annual Physical	<ul style="list-style-type: none"> All request for annual physicals must be booked through the nurse after appropriate screening tests have been ordered 	<ul style="list-style-type: none"> Create T-con to send to the patient's PCP's nurse Review CHECK-UP procedure to order any necessary screening labs prior to appointment 																																																																																																						
HEDIS/CHECK-UP referrals	<ul style="list-style-type: none"> Follow the CHECK-UP/HEDIS protocol for colonoscopy, mammogram, and other screening exam referrals 	<ul style="list-style-type: none"> Create T-con to send to the patient's PCP's nurse Order appropriate screening test-exam per CHECK-UP SOP 																																																																																																						
Complaint	Directions and/or Conditions	Action																																																																																																						
Overseas Screening	<ul style="list-style-type: none"> Required for active duty and family members who are PCS'd to an 	<ul style="list-style-type: none"> Refer to overseas screening office Overseas office will book patient with 																																																																																																						
Complaint	Directions and/or Conditions	Action																																																																																																						
Urinary Tract Infection (UTI)	<ul style="list-style-type: none"> Have patient fill out the UTI FAST Track sheet for the nurse managed clinic. 	<ul style="list-style-type: none"> Complete FAST Track sheet with patient information and hand to nurse Labs <ul style="list-style-type: none"> UA (urinalysis) If female, order pregnancy screening with bHCG testing. 																																																																																																						
Upper Respiratory Infection (URI)	<ul style="list-style-type: none"> Have patient fill out the URI FAST Track sheet for the nurse managed clinic. 	<ul style="list-style-type: none"> Complete FAST Track sheet with patient information and hand to nurse 																																																																																																						
Pregnancy Testing and Counseling	<ul style="list-style-type: none"> Urine test preferred as blood test is not any more accurate within the first week of conception given testing processing delays. 	<ul style="list-style-type: none"> Create T-CON and send to the nurse for NMP Order bHCG urine 																																																																																																						
Sexually Transmitted Infection (STI) Screening	<ul style="list-style-type: none"> Patient MUST NOT have any symptoms. For STATUS only. Not treatment. 	<ul style="list-style-type: none"> Create T-CON and send to the nurse for NMP. Order the following screening labs: <ul style="list-style-type: none"> GC/Chl (urine) Treponemal IgG Hepatitis C HIV (4 gen testing) HSV IgG (if requested by patient) 																																																																																																						
Blood Pressure Monitoring	<ul style="list-style-type: none"> Ensure patient has copy of blood pressure log 	<ul style="list-style-type: none"> Create T-CON for blood pressure and send to nurse Provide nurse with copy of the blood pressure log 																																																																																																						
Common Acute Care Issues/Concerns																																																																																																								
Wound Care	Acute infection / Cold / Flu symptoms																																																																																																							
Nausea/Vomiting/Diarrhea	Suture removal																																																																																																							
Anxiety/Depression	Sexual abuse/Domestic violence																																																																																																							
PFB/No shave waiver	Fracture/Dislocation																																																																																																							
Lower back pain (< 6 weeks)	Toenail removal																																																																																																							
Migraine	Constipation																																																																																																							
Joint pain	ALL other acute conditions																																																																																																							
Common Chronic Care Issues/Concerns																																																																																																								
Pap smear	LIMDU follow up																																																																																																							
Well-child	PRT/PARFQ waiver																																																																																																							
Referral to specialty clinic (initial)	Chronic joint pain																																																																																																							
Fatigue	Follow up for established issues																																																																																																							
Sports physical	Erectile dysfunction																																																																																																							
Difficulty sleeping	Lump/skin issues																																																																																																							
Acute	ALL other conditions lasting > 6 weeks																																																																																																							

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