

Pre-visit Planning Tool

Frene' LaCour-Chestnut, M.D.
Baylor College of Medicine

Pre-visit Planning Tool

- Can be used in any Primary Care Clinic Setting to prepare for a High Value, Quality Visit
- Can be used as a self audit tool to determine the quality of your preventive health care and to self identify areas of improvement
- Can be used as a peer review tool in the same manner as above
- Can be used by supervising physicians as an educational tool to teach resident physicians and medical students on providing high value preventive health care
- The template can be modified and adapted for use in Pediatrics, Internal Medicine, Family medicine, and MedPeds

Pre-visit Planning Tool

- The template is utilized prior to the scheduled office visit
- The EHR automatically pulls in significant data into the template
- The nurse or physician reviews the chart and fills in any unfilled variables into the template and orders outstanding preventive screenings or immunizations
- When patient arrives for scheduled visit, the nursing staff offers and appointment for or administration of the recommended preventive services

Pediatrics Template

- Patient is a @AGE@ child anticipated for upcoming visit
- Routine Immunizations:
 - -- Hepatitis B (3 doses by 6-12 months): ***
 - -- DTaP: (4 doses @ 12 months, 5th by 4-6yo, & Tdap @ 11-12yo): ***
 - -- Hib: (3 doses @ 6months, 4th @ 1yo): ***
 - -- PCV13: (4 doses by 12mo): ***
 - -- IPV: (3 doses by 6-12 months, 4th @ 4-6yo): ***
 - -- Rotavirus (3 doses rotateq or 2 doses rotarix by 6-8 months): ***
 - -- MMR: (1st dose @ 12-15mo, 2nd @ 4-6 yo): ***
 - -- Varicella (1st dose @ 12-15mo, 2nd @ 4-6 yo): ***
 - -- Hepatitis A (1st dose @ 12mo, 2nd 6months later): ***
 - -- Influenza (yearly > 6 mo): ***
 - -- HPV (3 dose series starting @ 11yo, @ 0, 1-2, & 6 months): ***
 - -- Meningococcal (1st @ 11-12yo, 2nd 5 years later): ***
- - numerous exceptions/rules when giving catch-up vaccinations

Pediatrics Template Example

- Patient is a 3y.o. child anticipated for upcoming visit
- Routine Immunizations:
 - -- Hepatitis B (3 doses by 6-12 months): UTD
 - -- DTaP: (4 doses @ 12 months, 5th by 4-6yo, & Tdap @ 11-12yo): UTD
 - -- Hib: (3 doses @ 6months, 4th @ 1yo): UTD
 - -- PCV13: (4 doses by 12mo): UTD
 - -- IPV: (3 doses by 6-12 months, 4th @ 4-6yo): UTD
 - -- Rotavirus (3 doses rotateq or 2 doses rotarix by 6-8 months): UTD
 - -- MMR: (1st dose @ 12-15mo, 2nd @ 4-6 yo): UTD
 - -- Varicella (1st dose @ 12-15mo, 2nd @ 4-6 yo): UTD
 - -- **Hepatitis A (1st dose @ 12mo, 2nd 6months later): DUE**
 - -- **Influenza (yearly > 6 mo): DUE**
 - -- HPV (3 dose series starting @ 11yo, @ 0, 1-2, & 6 months): N/A
 - -- Meningococcal (1st @ 11-12yo, 2nd 5 years later): N/A
- Hepatitis A and Influenza vaccinations administered after rooming patient but prior to patient being seen by physician for more efficient flow

Adult Female Template

- **Patient is a @AGE@ Female that is anticipated for upcoming visit**
- **Cancer Screening:**
 - -- Colon cancer screening: Serial occult blood x 3 yearly, Colon cancer q10 years or flex-sigmoidoscopy q5y (>50-75 yo): ***
 - -- Breast Cancer screening: Mammogram yearly (>40-75yo): ***
 - -- Cervical Cancer Screening: Pap smear every 3 years (21-65yo): ***
- **Immunizations:**
 - -- Tdap q10yrs: ***
 - -- PCV 13 and PPV 23 >65 yo (Pt needs PCV 13 first and then needs to wait 6-12 months for PPV 23; if PPV23 previously given, give PCV 13 1 year later): ***
 - -- Zoster vaccine once >60yo: ***
 - -- Influenza yearly: ***

Adult Female Template Example

- Patient is a 48y.o. Female that is anticipated for upcoming visit
 - **Cancer Screening:**
 - -- Colon cancer screening: Serial occult blood x 3 yearly, Colon cancer q10 years or flex-sigmoidoscopy q5y (>50-75 yo): N/A
 - -- **Breast Cancer screening: Mammogram yearly (>40-75yo): DUE**
 - -- Cervical Cancer Screening: Pap smear every 3 years (21-65yo): UTD
 - **Immunizations:**
 - -- **Tdap q10yrs: DUE**
 - -- PCV 13 and PPV 23 >65 yo (Pt needs PCV 13 first and then needs to wait 6-12 months for PPV 23; if PPV23 previously given, give PCV 13 1 year later): N/A
 - -- Zoster vaccine once >60yo: N/A
 - -- Influenza yearly: UTD
- Patient given appointment for mammogram and administered Tdap vaccine prior to physician entering the room for office visit

Adult Male Template

- Patient is a @AGE@ male that is anticipated for upcoming visit
- **Cancer Screening:**
 - -- Colon cancer screening: Serial occult blood x 3 yearly, Colon cancer q10 years or flex-sigmoidoscopy q5y (>50-75 yo): ***
- **Immunizations:**
 - -- Tdap q10yrs: ***
 - -- PCV 13 and PPV 23 >65 yo (Pt needs PCV 13 first and then needs to wait 6-12 months for PPV 23; if PPV23 previously given, give PCV 13 1 year later): ***
 - -- Zoster vaccine once >60yo: ***
 - -- Influenza yearly: ***

Adult Male Template Example

- Patient is a 71y.o. male that is anticipated for upcoming visit
 - Cancer Screening:
 - -- Colon cancer screening: Serial occult blood x 3 yearly, Colon cancer q10 years or flex-sigmoidoscopy q5y (>50-75 yo): UTD
 - Immunizations:
 - -- Tdap q10yrs: UTD
 - -- **PCV 13 and PPV 23 >65 yo (Pt needs PCV 13 first and then needs to wait 6-12 months for PPV 23; if PPV23 previously given, give PCV 13 1 year later): DUE for PCV 13**
 - -- Zoster vaccine once >60yo: UTD
 - -- Influenza yearly: UTD
- Patient consented to and given PCV 13 vaccination prior to physician office visit