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### **New Patient Telephonic Visits**

Min Stearns

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# RN New Patient Telephonic Onboarding

## Phase 1 pilot clinics: PMG Newberg, Progress Ridge, North Portland

### Introduction

PMG Oregon currently schedules approximately 60,000 New Patient visits each year. New patients are often seen at their first visit, with very little, and/or, without most up-to-date medical information transferred to their new clinical care team. The delay or lack of information results in challenges to our clinic teams to provide the best care for our new patients. It also results in providers/care teams spending additional time entering clinical data either during the new patient appointment, after the appointment, and often additional appointments are needed to address patient problems that could be completed in the initial visit.

### Success Measures:

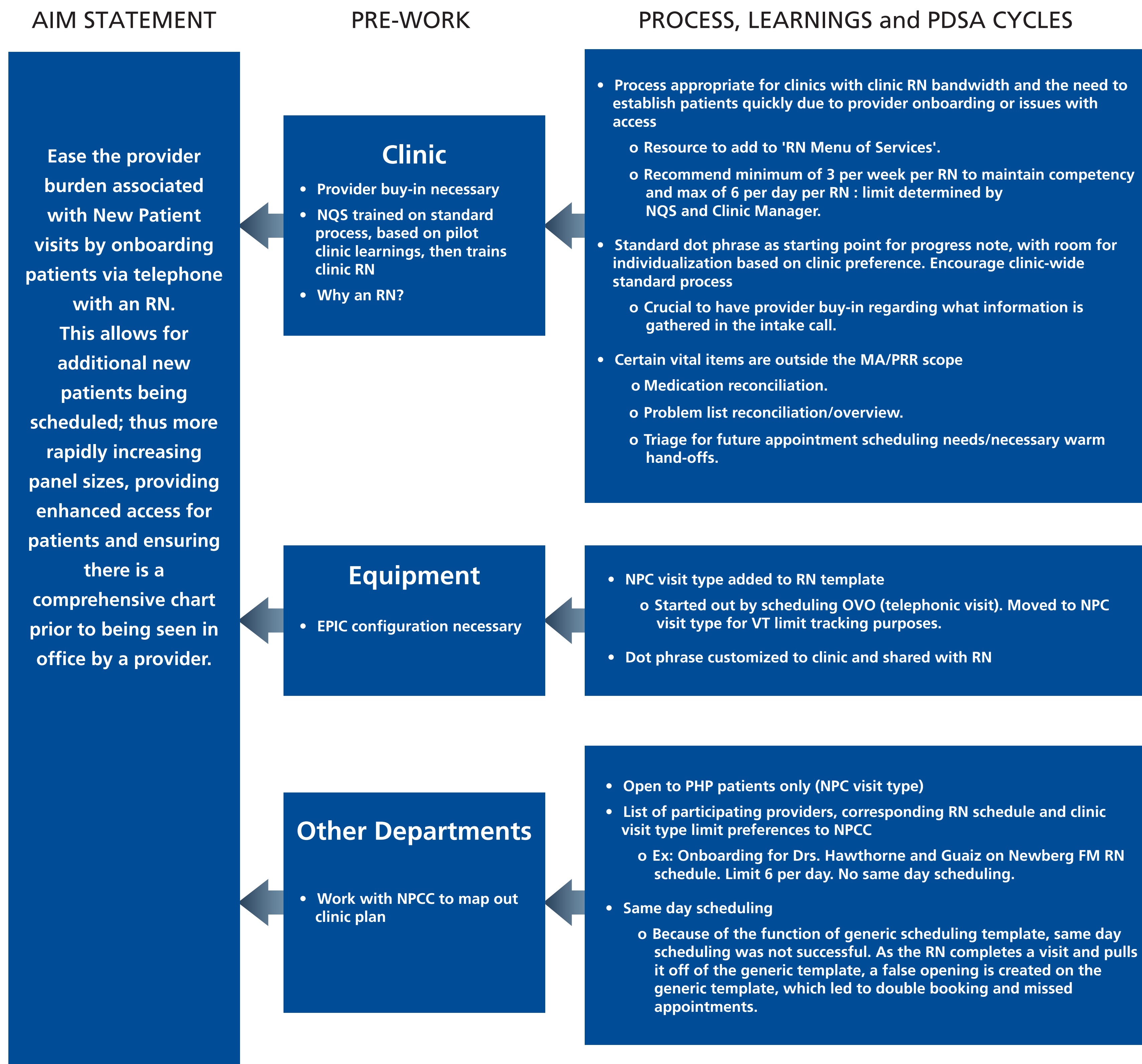
- Panel size growth rate
- NPC visit lag time
- Appropriate follow-up scheduling with agenda setting by RN prior to visit
- Appropriate wrap-around care coordinated prior to patient visit

### Why does it matter?

#### Patient examples

- Incarcerated patient was able to onboard and have a plan of care for after their release.
- Patient with schizophrenia who was rationing their medication so they wouldn't run out prior to establishing. Able to get same day med refill and urgent referral to psychiatry.
- Multiple patients with major depression and active suicidality looped in same-day with BHI.
- Pediatric patient with significant family trauma and social determinant needs able to be seen sooner with wrap-around support from BHI and case management.

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### Conclusions:

April 2019 data from pilot clinics:

Clinic	Scheduled RN NPC	Completed	Cancelled	No Show	No Show %	Seen within 2 weeks	RN Minutes (20 mins per completed, 5 per N/S)	Provider minutes gained (40 mins per completed)
PMG Newberg Family Medicine	88	61	13	14	18.6%	21 (34.4%)	1290 (21.5 hours)	2440 (40.7 hours)
PMG Newberg Internal Medicine	53	40	11	2	4.7%	15 (37.5%)	810 (13.5 hours)	1600 (26.7 hours)
PMG Progress Ridge Family Medicine	122	84	25	13	13.4%	12 (14%)	1745 (29.1 hours)	3360 (56 hours)
PMG North Portland Family Medicine	38	25	8	5	16%	8 (32%)	550 (9.1 hours)	1000 (16.7 hours)

Began process in October 2018

June 2019: Presented process and data to Model of Care

August 2019-present: Phase 2 pilot in process with additional clinics.

Participating clinics:

- Newberg FM
- Newberg IM
- Progress Ridge
- North Portland
- Happy Valley
- Sunset FM
- West Hills PC

August-November 2019: Sherwood FM trialed similar processes for their Clinical Value Improvement project

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