

6 Strategies to Improve Well Visit Rates

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by Dr. Sue Kressly, MD, FAAP

Well visits are essential to high-quality patient care, but they are also crucial for your practice's financial health. If you want a successful business, you must know where you stand when it comes to well visits. And in most cases, you'll find that you have an opportunity to improve.

How? By using a multi-stakeholder practice team, you can review your data, set a goal, and get to work. Here are six strategies to improve your well visit rates:

1) Understand your Active Patients

You need to know what percentage of your active patients are up to date on well visits. However, before you determine that number, you must figure out how many active patients you truly have. If you don't already have a policy and procedure and a practice team member who owns this process, you likely think you have more active patients than you actually do.

How does your practice identify active patients? Easy, run the **Demographic Analysis and Recall Report (DAR)** to show active patients and then filter to only show all patients you haven't seen in at least three years. Deactivate the patients you don't plan to recall and focus on your active, engaged patients. This will give you an idea of how big this project is going to be.

2) Gather Your QI Team

Every member of your practice team has a role to play in success and you need complete practice buy-in. It is equally important to create a QI team of champions with representation from every area, including:

- Triage
- Schedulers
- Check-in and check-out staff
- MAs and nurses
- Providers
- Office manager
- Reports guru

Another possible stakeholder is a parent advisory council, which can offer eye-opening insights about families' preferences for scheduling well visits.

3) Be Realistic About Data

As pediatricians, we often think we're better than average. But when you look at your practice's data, you're probably going to see it's not as great as you thought. That should not be demoralizing, but rather energizing because you see the opportunity to improve.

Do a root cause analysis and ask yourself:

- Why aren't we as good as we thought?
- Does the patient list need clean-up?
- Are infants leaving without their next appointment scheduled?

- Do I have no-shows or last-minute cancellations that no one has rescheduled?

We're all busy, and the biggest problem for most of us is prioritizing this work and empowering a team that is accountable for making sure it happens. This analysis is important, and you shouldn't start recalling patients without first figuring out where your problem is and where you can have the most impact.

4) See Your Opportunities

When you're deciding which patients to recall first, there are two main filters you can use: Payers and patients' ages.

- **Payers** – First, investigate which payers will pay the most. Especially look into payers who give pay for performance money (P4P). Infant and adolescent well visits are often a high priority, while school-aged well visits are usually a lower priority. If you can make P4P money, you can invest that back into your practice.
- **Patients' Ages** – When it comes to patient age groups, think about school- and sports-related demand when medical forms from a physician are required. For example, families with 5- and 6-year-old children who will be entering kindergarten will need well visits during the summer. In addition, older children who play sports need to be up to date on well visits in order for you to sign off on physical forms for athletics.

5) Optimize Your Schedule for Well Visits

If you're going to reach out to patients to recall them, you must have the capacity to schedule them. Otherwise, your staff will be frustrated and your patients will be angry. Here are some strategies to make room in your schedule.

- **Put local school holidays in your system.** This allows you to remind employees that not everyone can take those days off. Often organized families will push for visits on those days to reduce hassle and impact to their busy lives. When they call to schedule a well visit and are concerned about missing school, you can say to them, "Why don't we schedule for Columbus Day since there's no school that day?"
- **Reserve early mornings and late afternoons for well visits.** Families with young children who go to daycare or preschool usually prefer mornings for well visits. It's easier for them to plan their day with an appointment between 8 and 9 a.m., rather than reverse engineer their day and come to a later appointment with a cranky child. Meanwhile, families with elementary-age kids and adolescents like the 4-6 p.m. timeframe because it's after school but before extracurricular activities begin.
- **Consider self-scheduling and/or walk-in well visits.** Early afternoons seem to be a downtime in pediatrics. You can offer self-scheduling and open up slots only from 12-3. This is great for parents who don't want to call and prefer to schedule online. Another possibility is to advertise walk-in well visits from 12-3 if you routinely have an empty schedule during that time frame.
- **Use the 50-minute hour.** When you book appointments, schedule them for only 50 minutes out of every hour. This allows wiggle room every day to turn sick appointment slots into well visits or to see an additional sibling.

6) Choose Your Recall Team

After you've identified the patients you plan to recall and made room in your schedule, now it's time to act by reaching out to patients. Choose the team members who will carry out these responsibilities. This may be a couple of MAs or nurses, but you must give them protected time in order to be successful.

Run recalls at the beginning of every month for patients who are **due or overdue for well visits**

- The first outreach can be a bulk text message inviting them to schedule a well visit.
- After two weeks, send another blast to the families who didn't respond and remind them to schedule.
- Then, have your recall team reach out to remaining families personally through portal messages or texts.
- Keep working your list until everyone has engaged.

If you have families who are not responsive no matter what you do, consider sending a series of three letters, with the last one explaining that you will be sending their medical records, as you consider them not participating actively in important patient care.

Continuous Improvement Process

It's understandable if you feel a little overwhelmed, but take a breath and approach this effort incrementally as a continuous improvement process. As you advance this work over the course of several months, remember that it may take several years for you to make sure that all of your active patients are up to date on well visits. Even then, you must be committed to sustaining this work. However, it *will* be worth the work because your patients and your practice will be healthier.
