

Best Practices For the End Of a Patient Visit

A good “good-bye” or closure to the office visit can save the practice follow-up phone calls and can help the patient get the most from their time at the practice.



1. The provider should end the visit by having the patient or caregiver **repeat back what the plan of care** is so the provider can assess their understanding. Some practices give patients a takeaway form that has any medication changes and suggestions for diet, exercise, or repeat lab work, and others dictate the office visit and give the patient a paper copy of their visit documentation before leaving the office.
2. If the patient is having any lab work or tests, information about **when the results are expected to be reported to the practice and how the practice will be informing the patient** is important. Giving the patient very specific instructions in writing on calling the practice if they haven't heard back can eliminate a lot of unnecessary phone calls for the practice and a lot of unnecessary worry on the patient's part.
3. The medical assistant or nurse can walk the patient to the check-out desk and ask **“Were all your questions answered today?”** As an alternative, the check-out person can ask that question, and if need be, either bring the patient back to the clinic area, or page the assistant to come to the check-out area to speak with the patient if there are questions.
4. There should be very clear communication on **when the patient is to return** if a return appointment is needed. If the patient is not able to make the appointment at check-out for any reason, the practice should have a

manual or electronic tickler to follow-up with the patient and schedule the appointment at a later date.

5. When on the phone with patients staff should always finish a conversation with a recap, **repeating the information** the patient asked for and making sure the patient had time to write it down. Trying not to rush a patient off the phone, but doing things in a friendly yet businesslike way is an art!

Note: Letting the patient know how your practice will handle their calls is an important thing to discuss with new patients. Will the patient get to speak with the doctor or the nurse? How soon will someone call back? How does a patient communicate an urgent need? Discussing these practice protocols before the patient needs to know can help a patient have confidence in your practice and reduce repeat calls and confusion.