Supplemental Digital Appendix 1

Telephone Visit Instructions and Phone Note Template

Dear PGY-2,

As part of our effort to improve the quality of care provided to our patients during the legatee transition, we have blocked an hour of your clinic today to call your new “high risk” legatee patients. This is so you may check on them briefly to see if they may need medications or have any urgent concerns. At the same time we hope your communication will help you assume care for the patient and increase the likelihood they will make it to their first visit with you.

Attached is a template that you may use as a guide to call your patients and document the telephone visit. Also attached is a copy of the signout you received with the list of “high risk” patients to call. It is not necessary to call them if they see you in clinic today but you should attempt to call the rest of the patients.

Please reschedule any legatee patients who miss visits with you by emailing PCG Schedule so we can ensure no patients are lost during the transition.

Thanks,

Julie Oyler, MD
Lisa Vinci, MD
Amber Pincavage, MD
Vinny Arora, MD

2011 PGY-2 High Risk Transfer Patient Telephone Visit**to be completed on the high risk transfer patients at the designated block during your 1st clinic as a PGY-2.

Prior to calling check patient’s appointment with you and any studies listed on the signout. If you have any uncertainty during the telephone visit, you should ask the attending preceptor, Dr. Oyler or your ATG attending. Document any calls, messages left, or attempted calls by dictating a note on emdat or using PCG phone notes (template below).
Suggested format for telephone visit:

Hello Mr./Ms. __________________,

This is Dr. ____________________ I am your new doctor. I took over for Dr. __________________ recently and he/she told me all about you. I am calling to quickly introduce myself and check on you.

Do you have any questions or concerns? (Address any urgent issues, etc)

Do you need any medications?

Have you had any tests lately? Did you get your results?

I want to remind you about your first visit with me. It is on ________________ in our office on the 3rd floor of the clinic building/DCAM. Will you be able to make it?

I want to review how to get in touch with me if you need to. My name again is Dr. ___________. The Clinic phone number is 773-702-6840. My nurse’s name is Keha/Cherie.

I look forward to meeting you and taking care of you. Goodbye.

Note Template for High Risk Patient Telephone Visit

** Dictate a note if you speak to the patient, leave a message or attempt to call

I called patient ________________ MR _______________ today to establish care as their new PCP and check on them.

They had the following active issues: (none or ________________)

I refilled the following medications: (none or ________________)

I will see them next on ________________
Supplemental Digital Appendix 2

University of Chicago Medical Center Clinic Legatee Survey – Fall 2011

** Do not complete if you go to CHC

1. Have you seen any resident legatee patients? Yes No

   a) If so, about how many? <10 10-20 20-30 30-40 >40

2. Is your legatee still at the University of Chicago? Yes No

3. How many patients were generally aware of the physician transition? (circle response)
   None Few Some Most All

4. Did you receive a signout? (circle response) Yes No

   a) In what form? (circle all that apply)
      paper email face-face conversation phone conversation

   b) If you had a verbal signout, approximately how much time did it take? (circle response)
      <5 min 5-10 min 10-20 min 20-30 min >30 min n/a

   c) How satisfied were you with the signout you received from your legatee(s)? (circle response)
      Very dissatisfied Dissatisfied Neutral Satisfied Very satisfied

5. Since July, did you have additional discussions with the legatee(s) about your shared patient(s)? Yes No

   a) If yes, how many times?  

   b) Where these additional discussions helpful in clarifying areas of uncertainty? Yes No
6. Did you call your high risk transfer patients during your first clinic as a PGY-2?   Yes   No
   a) About how many patients did you call? _____
   b) About how many did you speak to? ________
   c) How many studies did you notice that had been missed during the phone visit? (circle response)
      None   Few   Some   Many
   d) What were the barriers to having the telephone visits? (check response)
      __Incorrect patient contact info   __Too busy with inpatient service   __Time
      __Worked on other clinic work   __Difficult to talk to pt you don’t know   __Uncertainty about what to do

7. How helpful were the following in the transition: (check your response)

<table>
<thead>
<tr>
<th>Item</th>
<th>Unhelpful</th>
<th>Somewhat unhelpful</th>
<th>Neither</th>
<th>Somewhat helpful</th>
<th>Helpful</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most recent clinic note</td>
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<tr>
<td>Epic snapshot (problem list &amp; meds)</td>
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<tr>
<td>Verbal signout</td>
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<tr>
<td>Paper signout</td>
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<tr>
<td>Epic inbasket forwarding</td>
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<tr>
<td>Telephone visits with legatee patients</td>
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<td>Intern to junior orientation Handoff lecture</td>
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<tr>
<td>“High Risk” designation in epic &amp; for schedulers</td>
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<tr>
<td>Telephone visit script and sample note</td>
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<tr>
<td>Other:</td>
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</tbody>
</table>

8. How much do you agree with the following statements? (please check response)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neutral</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>A more detailed signout would be helpful to avoid uncertainty, adverse events, and/or near misses</td>
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<tr>
<td>It is helpful when the patients are prepared for the transition</td>
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<td>Having transfer patients see me in clinic as soon as possible after the transition is better for patient care</td>
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<td>I am worried that I am missing something in the transition</td>
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</tbody>
</table>
A patient is not mine until I see them in clinic
The legatee process is stressful
I am not comfortable completing paperwork for a patient until I’ve seen them in clinic
It is important to take proactive ownership of the high risk legatee patients
I had adequate guidance on how to handle this transition
I had adequate supervision to handle this transition
The telephone visit helped me assume care of the high risk transfer patients I called
The telephone visit was helpful to the patients

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9. Since July, did you discover any information that you think your legatee(s) should have discussed with you? Yes No don’t remember
   a) If yes, how many times? _______
   b) Please give details:

10. Since July, did something bad happen OR ALMOST happen for any patient(s) because of missing or unclear information? (i.e. missed test result, ED visit, hospitalization, etc) Yes No
    a) If yes, how many times? _______
    b) Please give details:

11. Regardless of whether anything went wrong or not, is there anything about the communication that you think should have been better?

Thanks for your time!!