

The people we serve at CrossOver often have been unable to address many health conditions or symptoms due to lack of access to care. As a result they often desire to have many issues addressed in one visit. The risk is that we end up doing a mediocre job with multiple issues instead of a great job with fewer issues. Too often patient education becomes either too abbreviated or, conversely too much to retained. Additionally, it often causes a delay for people waiting in the lobby to be seen.

We need an effective approach that validates the patient's concerns while setting realistic expectations for what can effectively be addressed in one visit. Nursing personnel can make a huge difference in this area by helping set the patient's visit expectations. Below are a few suggestions-

- Identify from the chart and/or ask the patient for the **primary reason** for the visit.
  - This may already have been documented at time of appointment creation in the “reason for visit” field. We are working on protocols to have this filled out more commonly.
  - If the primary reason is hard to figure out, you can often find it in the last progress note or from the last documented phone call.
- **“Rule of 3”** (I got this from Elinor Pyles)
  - This is **not** a fixed rule, but a general concept that for most visits to be effective they should be limited to 3 or less conditions and/or symptoms. Ask the patient which 3 things they want to focus on and take your nursing history accordingly.
  - Validate other symptoms by stating a follow up in person or telehealth visit can be set up to discuss. Documenting the other symptoms accordingly-- “at a future visit Ms \_\_\_ would also like to discuss \_\_\_.”
- **“Game-changers”**
  - These are items that must be addressed first if brought up or discovered because of their acuity or the length with which they take to evaluate. Examples would be chest pain, worsening depression, a severely elevated BP (i.e. >160/>100) or an a1c of >10. Focus your energies on “game-changers” when they occur and set the patient's visit expectations accordingly.