

# Creating a Patient Guide for a “Medical Home” Physician Practice

## **Co-Authors:**

Jessie Gruman, PhD  
Dorothy Jeffress, MBA, MSW, MA  
Susan Edgman-Levitan, PA  
Leigh H. Simmons, MD  
William A. Kormos, MD



## Creating a Patient Guide for a “Medical Home” Physician Practice

When you check into a hotel room, what is usually sitting on the desk? A guide to the hotel. It lists what services are available and when they are available. It describes where the hotel is located relative to the highway and the airport. It contains information about the phone and TV and radio, pool and fitness center, and how to use the wireless connection. And most importantly, it tells you how to contact the people who can help you with reservations, housekeeping, room service, and wake-up calls.

The services the average hotel offers are no less complex than the services offered to patients and their families in the average physician practice, though the goal is obviously very different. Are patients and families provided with such a guide when they receive care at your practice?

As you shift your practice focus toward becoming a patient-centered medical home, consider providing a guide to your practice. In doing so, you communicate three important ideas:

First, that patients are welcome in your practice.

Second, that you want patients to make the best possible use of the services offered by your practice. You demonstrate that you understand that patients are probably unfamiliar with the routines of your practice. A guide describing how and when to access care helps them take more effective action and decreases the burden on busy staff to answer mundane inquiries.

And third, by giving your patients and their families this information, you communicate that a medical home is not standard primary care but rather a way of delivering more comprehensive care that in turn requires of patients a different level of involvement in their own care. Providing information about how to make use of this new approach to care helps patients understand their new role.

We have created three resources that medical home practices can use to create a simple guide for their patients. Such a guide will give your patients and their families the information they need on how to make an appointment, how to contact the doctor or the team, whom to discuss financial matters with, whom to call for problems in the middle of the night, and how referrals and lab reports are handled.

The three resources are:

- A. A list of the elements that constitute a basic guide.
- B. A sample guide, “Welcome to Grove Street Practice” illustrates what a finished guide might look like.
- C. A sample “fill-in-the-blank” template so you can design your own guide.

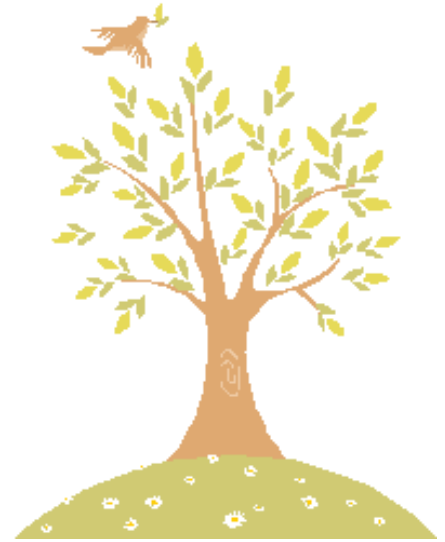
A concerted effort by practices and clinics to provide this information early and often to every patient in the form of a pamphlet provided at every visit, available in the waiting room and posted on practice websites would be welcomed by most patients.

## What Should a Short Guide for Patients Include?

A basic "how to benefit from and use our medical services" guide for patients should include information about:

1. **Contact**: Phone and fax numbers, office hours, web address, e-mail policy, hours of operation.
2. **Location**: Address, location, public transportation, parking.
3. **Appointments**: How to make appointments, no-show policies and expectations for timely arrival with reasonable estimates of waiting times (both for an appointment and when waiting to see the clinician after arriving).
4. **Medical record**: Instructions for bringing a summary of patients' medical history, current health status and recent test results or referral documentation as appropriate.
5. **Special needs**: If and how the provider can accommodate unique needs (physical navigation, hearing or visual impairments, translation services, etc.) and how to arrange for assistance if needed.
6. **Payment**: The health insurance documentation and/or payment process required for receiving care. Contact information for staff administrator.
7. **Tests and test results**: Description of what types of tests are commonly conducted in the practice, by an external provider (with names and contact numbers for commonly used laboratories and radiology facilities), and practice policy about patient notification of test results.
8. **After-hours and emergency care**: Guidance about when to seek and where to go for after-hours and emergency care.
9. **Prescriptions**: Instructions for securing prescription refills, reporting adverse side effects and decisions to discontinue medication or change agreed-upon treatment plan.
10. **Care companion**: Suggest that patients who need or would like physical, emotional or treatment support bring a companion along with them to visits.

# Welcome to Grove Street Practice



Here is some basic information about how we work.

At the Grove Street Practice, we work in teams consisting of a doctor or nurse practitioner, nurse, social worker and nurses' aide in order to give you the best care we can. When you first come to the practice, we will talk with you and match you with a team that meets your personal needs. After this, whenever you make an appointment, the scheduler will ask you the reason for your visit and will make an appointment with the team member best suited to help you resolve it. Even though you have an appointment with one team member, other members may consult with you while you are here. Your team members all have access to your health history and are available to help you.

### CONTACT

**Office hours:** This office is open Monday - Wednesday 12-8, Thursday - Saturday 7-2.

**Main phone number:** (123) 456-1234.  
Lucia Regno and Charlotte Reins schedule appointments, help answer general questions, and can also connect you with team members at this number.

**Web address:** [www.grovestreetpractice.com](http://www.grovestreetpractice.com).  
You can also contact us by secure e-mail through the site.

### TYPE OF APPOINTMENT

- If you would like to speak to a nurse about your symptoms, call Gerry Hill at (123) 456-1234.
- If you have an emergency illness or symptom that requires immediate, urgent attention, call 911. If you need an appointment for illness or a symptom, call (123) 456-1234. We will try to give you an appointment within 36 hours.
- If you need a check-up or follow-up visit, please call the main number (123) 456-1234.

### WHERE

- The Grove Street Practice is located at 450 Grove Street between Gray and Bradbury.
- The #4 bus and the #8 bus stop within 3 blocks of the Practice.
- Parking is available on the street and in the parking lot behind the building.

### PAYMENT

We participate in most insurance plans, including Medicare. Be sure to check with us to confirm that we accept your insurance before making an appointment.

Please be prepared to pay (or co-pay) for services at the time of your appointment. We accept check, Visa, MasterCard, and cash.

If you have questions or want to discuss payment or your bill, call Richard Clark at (123) 456-1234.

## FOR EVERY APPOINTMENT, PLEASE BRING:

- Your insurance card.
- A list of current prescription and non-prescription medications, vitamins and supplements.
- A good description of the problem, how long you have had it and how it affects you.
- A list of questions you would like to discuss with a member of the team.

## SPECIAL ACCOMMODATIONS

- The Practice is accessible by wheelchair. The entrance ramp is on the north side of the building.
- People with limited sight and hearing should bring a companion to ensure clear communication.
- Please let us know if you prefer to receive your care in Spanish.

## AFTER-HOURS CARE

If you would like to speak to a clinician to help you decide how to treat an illness after hours or to help you decide whether to go to the emergency room, call 800-234-2345. This is a special after-hours service we offer. They will not have access to your records or to your team until the next day.

If you need to speak to your team leader after hours, call (123) 233-1234 and the service will page the team leader who is on call. He or she will return your call within an hour.

If you receive care at an emergency room or urgent care center, please let us know by calling (123) 456-1234 within 48 hours so we can assist with follow-up care as needed.

## PRESCRIPTIONS

- Please provide your pharmacy name and phone number.
- Refills of existing prescriptions are handled by calling James Riley or Brynn Agno. They can be reached at (123) 456-1234.
- If you have questions about a new prescription or about discontinuing medication(s), please also call James Riley or Brynn Agno. They will help you decide if you should come back in for a visit to discuss your prescriptions. Call James or Brynn at (123) 456-1235.

## LABORATORY AND DIAGNOSTIC TESTS

- We draw blood at the clinic and send it to Raycon Laboratory for analysis.
- Most other routine diagnostic and radiology tests are done by Ferridge Diagnostics at 300 Main Street (234) 234-2345. We will refer you for any tests but you will need to schedule them yourself.
- A member of your team will call you to discuss results of testing and needed follow-up.

### TEAM BLUE

**Leader:** Jan Stewart  
Nurse practitioner

**Maria Sanchez**, nurse\*  
**James Riley**, nurses' aide  
**Sarah Pilas**, social worker

\*[test results contact]

### TEAM GREEN

**Leader:** Terry Moran, physician

**Gerry Hill**, nurse  
**Nora Myer**, nurse\*  
**Lara Marsh**, nurses' aide  
**Sarah Pilas**, social worker

\*[test results contact]

### TEAM TAN

**Leader:** Bert Saller,  
Nurse practitioner

**Sandy Riles**, physician's assistant\*  
**Brynn Agno**, nurses' aide  
**Sarah Pilas**, social worker

\*[test results contact]

## “Fill in the Blank” Patient Guide Template

If you don't want to design your own guide, here is a form including the basic items necessary for a simple patient guide. You can fill in this template and use it to make simple copies on an office printer, place on your website or even use as part of a telephone messaging system.

- **OFFICE HOURS:** We are open from \_\_\_\_\_. If you require urgent care after regular business hours, please call \_\_\_\_\_ or 911 in the event of a medical emergency, or go immediately to the nearest emergency room.
- **APPOINTMENTS:** To schedule an appointment, please call \_\_\_\_\_ during regular business hours or e-mail us your request at \_\_\_\_\_. Plan to arrive \_\_\_\_\_ minutes before your appointment to fill out any necessary paperwork or call if you need to cancel. Failure to show up for your scheduled appointment will result in a \_\_\_\_\_ charge.
- **SPECIAL NEEDS:** Please let us know if you have a hearing, visual or physical impairment, or need an interpreter so that we can accommodate your needs. Our TTY number for medical advice and appointments is \_\_\_\_\_. Feel free to bring along a family member, friend or health advocate to your appointment for assistance in understanding or remembering the doctor's instructions and give us permission to have your medical condition discussed in their presence.
- **PAYMENT:** We accept the following forms of payment \_\_\_\_\_ and charge \_\_\_\_\_ for checks that are returned unpaid. Please bring personal identification and insurance information to your office visit, and we will notify you if there are changes with the types of insurance we accept. Your co-pay must be paid \_\_\_\_\_. If you have any questions about payment, billing and insurance, please call \_\_\_\_\_.
- **MEDICAL RECORDS:** Please bring or be prepared to fill out a summary of your health status, personal and family medical history, and copy of your referral for treatment if one is available. To request a copy of your medical records for another doctor, please call \_\_\_\_\_.
- **MEDICATION:** Please bring a list of medications you're taking and report any adverse side effects. We are able to fill some prescriptions in the office and order those refills if requested or call them into your pharmacy. Refills can be requested by \_\_\_\_\_.
- **MEDICAL TESTING:** This office provides the following diagnostic examinations and early detection screenings: \_\_\_\_\_. A copy of lab results will be sent to the doctor who ordered them and can be obtained by calling \_\_\_\_\_.

---

(\*Adapted from the Center for Advancing Health's Engagement Behavior Framework)

## Center for Advancing Health

2000 Florida Avenue, NW Suite 210  
Washington, DC 20009-1231  
Tel: 202-387-2829 Fax: 202-387-2857  
[www.cfah.org](http://www.cfah.org)

The Center for Advancing Health publications promote our mission to ensure that every person is a prepared patient. Increasing the quality and years of healthy life and eliminating health disparities are only possible if people have the knowledge, confidence and skills to make informed health decisions and interact productively with health care providers. The Center is an independent non-profit organization which receives funding from the Annenberg Foundation and the W.K. Kellogg Foundation and others.