# Pre-visit laboratory testing implementation checklist

# Framework for a quality improvement or MOC Part IV activity

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| Assess | |
|  | **Identify opportunities for improvement.**  In reviewing this toolkit, did you see any strategies that are not currently being used in your practice that may help the team achieve more efficient and meaningful patient visits, and reduce time spent calling patients after visits with results? |
|  | **Obtain baseline data to understand the current state.**  Use this module’s proposed metrics to measure an indicator that is important to the practice, such as an outcome or satisfaction measure. **See metrics and data collection forms.** |

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| Improve | |
|  | **Re-appoint the patient at the conclusion of each visit.**  Scheduling the next follow-up appointment before the patient has left the office says, “We want to see you again, and we will plan ahead to make your visit as meaningful as possible.” |
|  | **Pre-order labs and other needed tests.**  Schedule laboratory and other diagnostic tests at the appointment. This means it does not need to be done later and helps to increase patient compliance. |
|  | **Use a “visit planner” (paper or electronic checklist) to arrange the patient’s next appointment(s).**  Using this checklist, the physician can indicate any interval care and associated labs to be completed before those appointments. |
|  | **Arrange for tests to be completed *before* the next visit.**  By having a face-to-face conversation about results and any follow-up care with the patient at the visit, the physician will spend less time communicating with patients about lab results after their visit. |
|  | **Delegate computerized order entry.**  Leverage appropriate staff to complete order entry and save valuable physician time. |
|  | **Empower staff to manage the inbox.**  Staff can triage messages and address many of them, escalating only appropriate messages for physician review. |

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| Reassess and reinvigorate | |
|  | **Measure your success using the predetermined metrics.**  Use results obtained from the chosen metrics to identify what is working well and where improvement efforts should be focused.. If participating in an MOC activity or a quality improvement effort, multiple improvement cycles may be undertaken. |
|  | **Celebrate and reinforce successes to keep the team energized and committed.**  Make the process fun and engage front line staff in all phases of the improvement effort. |

Source: AMA. *Practice transformation series: pre-visit laboratory testing*. 2015.

Contact the AMA for implementation support at [StepsForward@ama-assn.org](mailto:StepsForward@ama-assn.org) or by calling   
(800) 987-6630.