

Designing and Testing a Visit Planner to Help Patients Address Their Top Concerns during Healthcare Visits

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What was the research about?

Often, patients and doctors don't have enough time during healthcare visits to talk about all of a patient's concerns. Helping patients prepare for their visits may improve the quality of care.

In this study, the research team created a visit planner to help new patients and patients with more than one long-term health problem prepare for their visits. The tablet-based planner, which was available in English or Spanish, helped patients identify their top concerns before their visits and understand the care plan after their visits. The team compared patients who received the visit planner with those who didn't and looked at

- Closing care gaps, which are tests and treatments, such as blood sugar testing, that patients need to improve their health but haven't received yet
- Improving care quality, such as communication quality and satisfaction with care

What were the results?

After six months, patients in the two groups didn't differ in closure of care gaps. Compared with patients who didn't receive the visit planner, those who did were more likely to say they

- Prepared questions for their doctors
- Told their doctors about their top concerns at the start of their visits

The two groups didn't differ in how often patients

- Were satisfied with their care
- Were offered treatment choices
- Were asked about their ideas and goals for their care
- Took medicine as directed by their doctors
- Attended follow-up visits

Who was in the study?

The study included 750 patients who had at least two long-term health problems or who had a new patient visit. All patients received care at a healthcare system in California. Of these patients, 38 percent were white, 28 percent were African American, 22 percent were Hispanic, and 7 percent were Asian. The average age was 61, and 65 percent were women.

What did the research team do?

The research team assigned doctors by chance to one of two groups. The team then assigned each doctor's eligible patients to the same group as the doctor. In the first group, patients completed the visit planner in the waiting room. These patients brought a summary of their plan to their visits. In the second group, patients received a healthy lifestyle information sheet. Patients in both groups received their usual care from their doctors.

To identify care gaps, the research team reviewed patients' health records. They looked at what tests and treatments patients needed to receive at the start of the study and monthly for six months, and what care they did receive. Patients took surveys about care quality by phone within two weeks of their visits.

A group of patients, community members, and doctors helped design the visit planner and gave input during the study.

What were the limits of the study?

The care gaps identified in the health records may not have been the same as patients' top concerns for their

visits. Patients with long-term health problems received extra care from nurses and others, which may have affected the study results.

Future research could explore ways to address patients' top concerns during visits and find out whether addressing these concerns leads to improved health and care quality.

How can people use the results?

Healthcare clinics can use these results when considering ways to improve patients' visits.

To learn more about this project, visit www.pcori.org/Grant022.