





A Human Factors Pre-Visit Planning Intervention to Improve Primary Care Physician Situation Awareness for Elderly Patient Visits

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Research Question

- Information chaos is the major hazard in the primary care of elderly
- Little known about impact of PC redesign on PCP outcomes
- Does a human factors designed intervention to improve information availability at elderly patient visits
 - Increase PCP situation awareness
 - Decrease PCP mental workload

Study Design

- Randomized controlled trial of a pre-visit planning intervention
- 16 Physician-nurse teams at 4 Primary care clinics in Wisconsin
 - Pre: 768 elderly pts; Trial 768 pts control/INT
- Timeline:

Pre-intervention	Trial Phase
• Care-as-usual	• Control & Intervention
Feb 2011	Oct 2011 Nov 2011 Apr 2012 Jan 2013

Intervention training

Pre-visit Planning Intervention - 3 parts

- Nurse chart review & patient phone call 4-5 days before visit using 'pt overview document (POD)'
- Nurse – Physician Huddle before visit
- Physician uses POD during visit
- POD Info collected:
 - Reasons for visit & patient questions
 - Elderly health overview & health maintenance
 - New since the last visit
 - F/u items
 - Lab/test results
 - Visits with other clinicians
 - Medication changes
 - Chronic ongoing problems
 - Chronic disease control

The screenshot shows a complex form titled 'Patient Overview Document (POD)'. It includes fields for patient name, age, gender, and date of birth. There are several checkboxes and text boxes for recording clinical information. The form is organized into sections with tabs like 'Health Overview', 'Medication Changes', and 'Home Readings'. A note at the bottom states: '*Used paper form in clinics, also programmed into EPIC'.

What This Means for Clinical Practice

- A standardized, nurse-led pre-visit planning team intervention
 - Improves PCP situation awareness before and during elderly patient visits
 - Improves PCP perceptions about visit itself
 - Does not adversely effect PCP mental workload
- Further analyses will determine if certain patient, visit or PCP characteristics influence these outcomes

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