Tracking Phone Encounters:
An Essential Step in Tracking Follow-Up After Hospitalization

In D2D 5.0, Follow-Up after Hospitalization was introduced as a core indicator. The D2D definition differs from the Ministry of Health and Long-Term Care definition, which is based on billing data, includes only in-office visits with physicians, and does not take into account that timely discharge information may not be available. Based on input from AFHTO members, the D2D definition of this indicator is "**% of those hospital discharges (any condition) where timely (within 48 hours) notification was received, for which follow-up was done (by any mode, any clinician) within 7 days of discharge.**"

While different teams may have different approaches to tracking this indicator, an important first step for many teams is to track **phone encounters**. Below we have listed a number of tips, tricks and tools, including EMR queries, that can be used for this.

Please note:

- **Reason for phone call:** we are NOT looking for calls about lab results, appointment reminders, invitations to programs, appointment bookings etc.
- **Access to hospital data:** we recognize that access to hospital discharge data may be a challenge and continuing efforts to improve this.
- **We are not looking for unique patients** – a patient may have had a number of hospitalizations and discharges requiring follow-up care, depending on their condition and care plan.
- **Please refer to the EMR specific instructions below to generate data for phone encounters.** A number of different options are presented. Once you have decided which tools to use, consider sharing your choices, challenges and successes with your EMR Communities of Practice or with the QIDS team so we can all get better at doing this!
- This definition is comprehensive and may be unattainable at first. The tools and queries below will help your teams get started at documenting and extracting phone encounter data in a consistent way. The queries will be refined as workflows become established, EMR functionality improves, and more meaningful data becomes available.

Telus PS

Using an *appointment scheduler* to track phone encounters:

- This guide shows you how to set up a "phone call" appointment type.
- Here's the search to find phone call appointments for a desired time period and for select physicians.
- Can your IHPs use this method as well?

Using an *encounter assistant* to track phone encounters:

- This guide describes how an encounter assistant can be used to track IHP stats including phone encounters.
- Here's the search to find phone encounter text in the encounter note created by an encounter assistant.
- **Note**: you will need to create your own encounter assistant specific to your team.

Using *custom forms and custom queries* to track phone encounters:

- A video about the tools and processes suggested in this option is accessible through Trello then Dropbox – please review the video and/or read this guide before proceeding.
- Here is the custom form for doctors and here is the custom form for patients/IHPs.
- If you don't have the custom queries installed (over 70 teams do have them!) please contact us to arrange a time to get them installed. More details about the custom queries can be found on Trello

Accuro

Using *encounter type (headers)* to track phone encounters:

- This guide illustrates how to use encounter headers to identify patients with a phone encounter.
- Here's a guide for the query to extract phone encounter data using encounter type (headers).

Using *appointment type* to track phone encounters:

- Here's a guide for the query to extract phone encounter data using appointment type.

Using *shadow billing codes* to track phone encounters

- Here's a guide for the query to extract phone encounter data using shadow billing.

Nightingale

Using *encounter type* to track phone encounters:

- Here's a guide that explains how to use data miner to extract data for the number of encounters labelled with "phone" within the past 12 months for all members of Team (Physicians, NPs, IHPs, office nurse and/or admin). Consider sharing your experiences running this query with us.

OSCAR

Using *"fake billing codes"* to track phone encounters:

- Here's how one team uses fake billing codes and report by template to successfully track IHP phone encounters (and other activities!).

Using *eForms* to track phone encounters:

- Consider using this eForm to track patient encounters with IHPs, including phone encounters
- Query to extract phone encounter data – UNDER CONSTRUCTION
- Is there an eForm for physicians? Would you like to create one? Please connect with the OSCAR CoP.

Using *appointment type* to track phone encounters:

- Does your team do this? if so, please connect with us or the OSCAR CoP.

P&P

Using *shadow billing* to track phone encounters:

- *A guide on how to use and query shadow billing is under construction.*

Please review the options in this guide that the P&P CoP is investigating for tracking phone encounters – there is lots more work to be done, queries to be written! Contact us if you'd like to help.

This guide describes how to use day sheet reports to track post-hospital visits. Can we modify it to capture post-hospital phone encounters? Contact us if you think this might work!