

Section 6.4 Optimize

Patient-Provider Agenda

This tool introduces the benefits of the patient agenda to providers. While many providers have concerns about patients bringing their own agendas to an office visit, many consumer groups are encouraging their use. There can be significant benefits for providers as well – as long as its use is managed effectively.

Time needed: 1 hour

Suggested other tools: Approaches to Patient Communications; Supportive Communications; Patient Visit Agenda and Preparation Checklist Template

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How to Use

1. **Review** the *Patient-Provider Agenda* tool to learn about its prevalence, problems and solutions, including different ways to construct and use a patient agenda.
2. **Consider** how to incorporate a patient agenda with a patient action plan to aid care coordination and manage a patient office visit.
3. **Try out** the patient agenda with patients with whom you believe would use it effectively to fine-tune skills in using the agenda, then introduce it to other patients with whom you believe would benefit.

What is a Patient Agenda?

There is no universally accepted definition of patient agenda, or protocol for how to handle a patient agenda. However, health care agencies and patient advocates, including Department of Health and Human Services, Agency for Health care Research and Quality, and American Association of Retired Persons encourage patients to bring an agenda to each office visit.

Patient agendas are becoming more common, and are closely linked to the patient action plan that community-based care coordinators (CC) use to help patients become more engaged in their care and more motivated to make lifestyle changes to improve their health status.

A 2009 study at the University of Wisconsin found that out of 216 family physicians and internists, more than 60 percent of patients brought agendas or lists of questions very often or sometimes to their providers.

The American Academy on Physician and Patient (AAPP) teaches providers to extract all of a patient's concerns during an office visit by asking for an exhaustive "What else?" list. Many other terms are used to describe agendas, such as the "Oh, by the way" statement, "Laundry list," "Today's visit" form, "Patient story" and others. This Toolkit tool uses the following definition as adapted from the AAFP discussion of a "Today's Visit" form

(<http://www.aafp.org/fpm/2003/0600/p59.html>):

"A patient agenda is a form that a provider's office asks the patient to complete, ideally in advance of a visit, but if that is not possible, then in the waiting room prior to seeing the provider. The form asks the patient to identify the main reason for today's visit and list other concerns the patient would like to discuss if there is time, and provides a checklist of things the patient might need but commonly forget to ask about, such as prescription refills, insurance referral forms, other forms, immunizations, and others."

TODAY'S VISIT

Main reason for today's visit: _____	

Other concerns I would like to discuss if there is time: _____	

Check all that apply:	
<input type="checkbox"/> I have prescriptions that need to be refilled.	<input type="checkbox"/> I need the attached forms filled out.
<input type="checkbox"/> I need a school or work excuse.	<input type="checkbox"/> I would appreciate prayer today.
<input type="checkbox"/> I need a referral for my insurance company.	
Patient's name: _____	
Date of birth: ____/____/____	

[See *Patient Visit Agenda and Preparation Checklist Template* for a reproducible form.]

Benefits of Patient Agendas

Although there seems to be much angst in the provider community about patient agendas, the following benefits have been identified by providers and patients alike. To reap some or all of these benefits, the next section of this tool identifies challenges and solutions for using patient agendas.

Benefits of a patient agenda that accrue to both providers and patients:

Provider Benefits of Patient Agendas	Patient Benefits of Patient Agendas
<p>Saves time during a visit by structuring the visit discussion on the most important concerns to be addressed during the visit and explicitly deferring other concerns to another visit or member of the care team.</p> <p><i>(Langewitz, et al. reported that in a randomized controlled trial of 900 patient encounters in which patients brought an agenda and providers were educated about them, the visits were only 1.9 minutes longer, the number of problems addressed increased by 50 percent, and patient satisfaction increased.¹)</i></p>	<p>Patient is not rushed and can be confident that all concerns are identified and are addressed, or will be appropriately addressed at another visit or by another member of the care team.</p>
<p>Helps ensure that important concerns are addressed in some way, reducing risk that important concerns do not get addressed.</p> <p><i>(A study reported by Marvel et. al., found that in 260 patient visits, the provider interrupted the patient's initial recitation of concerns after an average of 23.1 seconds, and patients rarely returned to completing their list of concerns for the visit.²)</i></p>	<p>Preparing for provider visits in advance helps patients remember questions and concerns they want to address with their providers. Addressing the agenda in an appropriate manner overcomes the issue of unrealistic expectations about what can be covered during one visit. When important concerns are negotiated, those the provider believes may be serious but the patient has put last (e.g., psychosocial concerns) can be brought forward and addressed without embarrassment.</p>
<p>Improves adherence to patient empanelment because the agenda is linked to the patient's primary care provider. This improves coordination of care.</p>	<p>Because the patient is asked to prepare an agenda for discussion with the primary care provider, the patient is familiar with the provider, knows what has been discussed previously with that provider, and can focus on new or recurring concerns.</p>
<p>Improves patient adherence to treatment regimens because the patient is more engaged, and the most important (to provider and patient) concerns are addressed.</p>	<p>Patient is engaged in the process of care by planning for the visit, which can result in better adherence to treatment regimens.</p>
<p>Eliminates phone calls from a patient who forgot to raise a concern during a visit.</p>	<p>Patient's most important health concerns are addressed so that treatment can begin immediately.</p>
<p>Increases patient satisfaction because all concerns are identified and either addressed or a plan made to address them at another visit or by another member of the care team.</p>	<p>Patients will be less frustrated that their most important concerns have not been addressed, either during the visit or planned for in some way.</p>

Challenges in Using Patient Agendas

There are two scenarios in which a patient agenda results in challenges:

1. ***The practice does not supply or encourage an agenda, yet the patient brings some form of agenda to a visit.*** This is the most challenging scenario because providers may not be prepared for how to deal with the agenda. Instead of being accepting of the agenda, the provider may dismiss it, only to make matters worse. The provider can become distracted thinking about the agenda but not really address it. And the patient can be frustrated by the lack of provider's willingness to address the agenda. If the provider does accept the agenda, a patient's concerns may not be listed in order of importance. If the provider simply starts down the list of all concerns, the most important one or ones may not get addressed, and both provider and patient will be frustrated. If the provider does attempt to prioritize the concerns in his or her mind the patient may still be frustrated that some concerns never seem to get addressed. These concerns may not be vitally important, but can be a source of annoyance or discomfort for the patient. Some innocuous appearing concerns can also suggest a medication issue. Finally, the provider may be concerned about liability for items on the list that were overlooked due to time constraints or considered unimportant because of missing information, but actually are important.
2. ***The practice does support patients who bring an agenda, but the agenda is not structured in a way that makes it easy for either the provider or patient to identify most important concerns.*** Though this scenario would suggest that providers have had some training in managing a patient agenda, it is not necessarily true of all providers in the office. Some practices may simply think that accepting an agenda is the right thing to do without considering how it should be used most effectively and efficiently for both the provider and patient. This may result in many of the same issues as in the first scenario. Even with some training on what to expect but without full buy-in, it can take longer to manage an unstructured agenda and lead to provider and patient frustrations.

Steps for Using a Patient Agenda

The following steps can help you be proactive about patient agendas in order for the practice and patient to get the most benefit:

1. **Discuss within the practice the value of a patient agenda**, along with the need to manage use of the agenda. Planning steps should include:
 - a. *Review articles* about patient agenda use.
 - b. *Train providers and staff* on how to manage use of the agenda.
 - c. *Discuss how the patient agenda will be used* with the patient action plan in a care coordination situation. The patient action plan is more of an aid to the patient on how to carry out lifestyle changes, ensure proper medication administration, and provide tips to the patient as to what to do when their condition changes. Many suggest keeping a patient diary as part of the patient action plan. This helps motivate the patient to continue pressing forward with their changes, and affords a way for a provider or care coordinator to monitor their progress. This may be a source document for items that should be on the patient agenda.

- d. *Gain buy-in* and consider doing a *pilot* with patients who are already bringing agendas in a responsible manner, roll out patient agenda use to all patients as each provider/team and their panel of patients are ready, then monitor use and make adjustments for improvement.
2. **Design a patient agenda form** that you will distribute to your patients. Using your own form structures the agenda in the manner you desire and will make it easier for everyone to use. For example, you may wish to ask the patient to report progress on patient action plan steps from the patient’s diary. The sample form of page 2 may be used as is or customized to your practice’s preferences. Other examples of a patient agenda form are available at:
 - <http://www.fmcnms.com/patient.agenda.091208.pdf>
 - http://www.lexingtonclinic.com/images/files/Patient_Agenda_Form.pdf
 - <https://www.eventbuilder.com/files/providence/86163/File/Patient%20Agenda%20Form.pdf>
3. **Distribute the patient agenda form to your patients.** For established patients, it is advisable for the primary care provider or team member known to the patient to hand the form to the patient and briefly explain either:
 - a. “We are happy to see you are bringing a list of concerns to your visit. It helps both of us make sure we address your issues. We think this is such a good idea we have created an agenda form for all of our patients. We will give you a new form at the end of each visit to use for the next visit. You can also download the form from our website. Can you do that for us?”
 - b. “We are instituting a new process that we think will really help you and us make sure we address all your health concerns. Here is a patient visit agenda we would like you to complete and bring with you to your next visit. It doesn’t have to be fancy. We may not be able to address every concern during the visit, but we can prioritize the concerns that are most important. We can be sure to cover other concerns either at the next visit, or your care coordinator or another member of your health care team here can work with you after our visit today, or we can contact you by phone. We will give you a new form at the end of each visit to use for the next visit. You can also download the form from our website. Can you do that for us?”
4. **Acknowledge the agenda at the start of the patient visit.** (If you have not instituted a patient agenda form and the patient chooses to bring an agenda or other form of list – follow this and the subsequent steps to use the agenda most effectively.)
 - a. You might say: *“Thank you for bringing an agenda/list of questions. Let’s look at it together.”*
 - b. If the patient has not brought the requested agenda or any other agenda, you might say: *“Do you have a list of what you want to talk about today? An agenda will really help us ensure we address all of your questions –*

either today or we can make specific plans to address some at your next visit/with your care coordinator/health care team member.”

- c. You can pull out a copy of your form and use it to take notes and initiate discussion. You can give that to the patient as an example of what you are looking for in future visits.
- 5. Discuss/negotiate what agenda items to address now** and which to cover in another visit or have the care coordinator or other health care team member address.
- a. If the list is long, you might say: *“You have a lot of issues/questions here – let’s look at this together and decide on the (three) most important issues for today.”*
 - b. If the list is short and you think there may be something missing from the list, you might say: *“I think we can cover much of this list today or your care coordinator [or other care team member] can help you as well, but I’d also like to take a few minutes to talk about your _____.”*
 - c. If the list is very short, you may want to confirm that there actually are no other issues. *“This is a short list! Are you sure there is nothing else – even if we just jot it down for next time?”*
 - d. If you think the list is manageable but you think one topic may take most of the time or is very serious, you may say: *“This is a good list. I think _____ is most important. Do you agree?”* (Pause to hear what the patient says and negotiate to mutually decide what is best.) *“If for any reason we don’t get to your other issues today, we can schedule a follow-up appointment and some of the items your _____ [care coordinator / other care team member] can also help you with.”*
- 6. Confirm the agenda for this visit.** Even though you may have gone through a negotiation process, you want to make sure the patient understands what is going to be addressed and what will be deferred. *“So let’s make sure we are on the same page; we’re going to talk about _____ first, and then address other issues in another visit. Is that correct?”*
- 7. At the end of the visit, plan for the next visit.** If there are outstanding issues, describe how they will be addressed. If there are no other issues, give the patient a blank agenda form. Thank the patient for using/helping you create an agenda for today. You might even note: *“This agenda has really helped me be sure we’ve covered your most important concerns immediately and assure that you will get help with the others as well. Do you agree?”*
- 8. Reflect upon the time spent and decisions made,** especially early in your use of the agenda. Take note of what you could have done differently if applicable.

References

¹ Langewitz, W. et al. 2002. Spontaneous talking time at start of consultation in outpatient clinic: cohort study. *BMJ*. 1002;325:682-683. Available at: <http://www.bmj.com/content/bmj/325/7366/682.full.pdf>

² Marvel, MK. Et al (1999). Soliciting the patient's agenda: have we improved? *JAMA*. 1999;281:283-287. Available at: <http://jama.jamanetwork.com/article.aspx?articleid=188387>

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