Comagine Health

Excelling with Annual Wellness Visits, Intermountain Moroni Clinic Boasts 87% Rate

For primary care doctors and clinics with schedules already full of sick patients, fitting in Annual Wellness Visits (AWVs) can be a challenge. One Utah clinic, however, has created a process that helps them provide AWVs to 87 percent of their eligible population.

What's the secret? Dr. Eileen Jackson says one big key to their success is having a team where everyone knows their role and fulfills that role well. "Team-based care is the fundamental element that creates success," Dr. Jackson said. "We are taking steps to further develop that in our clinic."

The team at Moroni clinic includes three main people:

- Dr. Eileen Jackson
- Anne-Marie Poulsen, patient service representative
- Marry Ramirez, care guide

Ramirez works on identifying which patients need an AWV using registry lists, and then scrubs their chart the day before their appointment to determine what tests/screenings they have had done and what they are due for. Ramirez keeps track of the timelines and paperwork to ensure patients get the care they need when they need it.

Poulsen is responsible for calling the patients due for an AWV to get them schedule and for helping them fill out their pre-visit paperwork when they come into the clinic. Poulsen says a big part of getting patients to schedule their AWVs is education and genuinely caring about each patient. "We make the patients feel like we really care about them and that they are important to us," Poulsen said.

Practice manager, Mike Gladding, says educating patients about the way an AWV benefits them instead of making it seem like just one more appointment has made a difference in their success. "We message it like, 'We care about you, we feel these things are very important to your long-term health to avoid the big expenses and big problems,'" He said. "It is consistently put across in a caring way."

That caring attitude does not end with the appointment, however. Ramirez says the team at Moroni Clinic also works hard to make sure they have up-to-date community resources and referral information for patients; everything from cash prices for a diabetic eye exam to low income mammograms to helping patients get copay or medication assistance. Knowing what is available and linking patients to community resources is what Ramirez calls "extra-mile service."

Even with a caring attitude, Dr. Jackson says not all patients are interested in coming in for AWVs. She says with some patients they have to meet them where they are. “There are many patients who need a lot of education and reassurance, most patients are not really interested in coming in just for the AWV, many people just come once a year or twice a year, so we just have to make that work,” Jackson said. “We explain to them that we just want to review everything, we want a few extra minutes to go over their history a little more thoroughly to make sure everything is on track. They usually accept that well.”

The team at Moroni also educated patients about the AWV when they came to the clinic for sick visits and tried to either do an AWV the same day or get patients scheduled for one before they leave. Dr. Jackson says really focusing on teamwork and treating each patient as an individual has been a big part of their success. The team has weekly meetings to discuss workflow, how to make their work more successful and which patients need to be contacted.

So, what advice would Jackson give other primary care doctors just starting out with AWVs? “Just jump in a do it,” Dr. Jackson said. “You just jump in and do it, and that’s how you work out the bugs.”

If you need assistance with your own AWV process you can find our toolkit here:
https://healthinsight.org/awv

Or contact the team at Comagine Health to get personalized help:
QualityPaymentProgram@Comagine.org

Comagine Health is ready to help practices take an integrated approach to the Quality Payment Program. We have studied the rules and stay informed on updates, clarifications, and CMS learning opportunities. Our experts include:

Idaho: London Manor-Petersen
Improvement Advisor
208-383-5942
lmanor-petersen@comagine.org

Oregon: Seema Rathor
Senior Improvement Advisor
971-409-3872
SRathor@comagine.org

Nevada: Aaron Hubbard, MHA
Improvement Advisor
702-948-0306
ahubbard@comagine.org

Utah: Perrin Anderl
Improvement Advisor
801-892-6608
panderl@comagine.org