

### **Title: Are We Following Guidelines for Documentation of Healthcare Maintenance Screening Exams for Our Patients in the Ambulatory Care Center?**

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#### **Background:**

Early detection of disease is a cornerstone of preventative medicine and is accomplished by age-appropriate health and cancer screenings. Various organizations, such as the U.S. Preventative Services Task Force, make evidence-based recommendations on which diseases should be screened for and when screening should take place. However, literature has shown clinicians have failed to provide such services due to lack of knowledge, time and an integrated system that allows them to follow recommendations. At the Ambulatory Care Center (ACC), a template dedicated to healthcare maintenance (HCM) is used to ensure screening exams and immunizations are up to date for patients. Our aim was to explore whether this template was being used effectively to follow recommended guidelines.

#### **Methods:**

We conducted a retrospective chart review of 100 patients that visited the ACC in the six months between July and December, 2020. Charts were chosen randomly and included both e-health and in-person visits conducted by resident physicians. Notes from each encounter were reviewed to determine whether they contained the “Healthcare Maintenance” template and whether this template was up-to-date and consistent with current guidelines.

#### **Results:**

Out of 100 clinic notes, 78 notes (78%) had HCM present and 22 notes did not have HCM present (22%). Of the 78 notes with HCM present, 25 (32%) had the up-to-date HCM template, however 53 (68%) did not have the up-to-date template included.

#### **Conclusion:**

ACC resident notes included some form of HCM documentation, however a majority of the HCM documentation was outdated or having missing elements. For example, items such as performing the ASCVD risk or removing vaccine information were not included. In the ACC patient population, there is a substantial “no-show” rate, which emphasizes the importance of ordering HCM testing, procedures and immunizations when patients present to clinic. In order to ensure that healthcare maintenance is up-to-date, residents should confirm the correct, updated and complete template is included in each note.

#### **Resources**

1. Ayres CG, Griffith HM. Consensus guidelines. *Health Care Management Review*. 2008;33(4):300-307. doi: 10.1097/01.HCM.0000318767.36901.0b.
2. Hollister D Jr, Romanello JM, Smith ML, Radford MJ. Use of physician-specific data and flow sheets to improve compliance with preventive and screening health care measures. *Conn Med*. 2006;70(10):613-620.
3. Soto CM, Kleinman KP, Simon SR. Quality and correlates of medical record documentation in the ambulatory care setting. *BMC Health Serv Res*. 2002;2(1):22. doi:10.1186/1472-6963-2-22