



Preventive Services Prompting Systems

Bright Futures is a well-known resource to those working with children who are interested in the promotion of healthy lifestyles and prevention of disease. The major risks to children's health and development, particularly after infancy, are largely preventable. The leading cause of death for children older than 1 year is injury, including motor vehicle accidents, firearms, and drowning. Well-child care (or health supervision) provides a vehicle for health care professionals to promote healthy lifestyle choices, monitor children for physical and behavioral problems, and provide age-appropriate and individualized counseling (or anticipatory guidance). Health supervision is best viewed as a process that occurs over time and that is responsive to the emerging capabilities and challenges of the individual patient. The Bright Futures recommendations for the frequency of health supervision visits coincide with key developmental periods.

Preventive services prompting systems can support health care professionals in ensuring that all children receive needed health promotion and preventive care recommended by Bright Futures. The use of a preventive services prompting system has 3 purposes: (1) to enable any member of the health care team to quickly assess whether or not a patient is up-to-date on preventive services, (2) to assist in the identification of patients in need of preventive services, and (3) to prompt the health care team about recommended preventive services during a patient visit.

When coupled with clear roles and responsibilities, preventive services prompting systems can help distribute work across a health care team, often freeing up provider time and improving satisfaction of staff. Such a systems approach facilitates communication across providers, recognizing that children do not always see the same provider at every visit. A preventive services prompting system complements the provision of routine services at well-child visits. Finally, having a well-described preventive services prompting system can facilitate screening for preventive services at non-well-child care visits and help to reduce missed opportunities.

One tool that can assist in the implementation of a preventive services prompting system is a preventive services prompting sheet (PSPS). Use of a PSPS will result in a 10% to 30% increase in the proportion of children who are up-to-date on preventive services.¹

Bibliography

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¹Prislin MD, Vandenbark, MS, Clarkson QD. The impact of a health screening preventive services prompting sheet on the performance and documentation of health screening procedures. *Fam Med*. 1986;18:290-292

Implementing a Preventive Services Prompting System

To implement an office-wide preventive services prompting system, practice-wide guidelines are needed. By starting with the *Bright Futures: Guidelines for Health Supervision of Infants, Children, and Adolescents*, 3rd Edition, your office will be able to prioritize preventive services for your patient population.

1. Form improvement team.

- Identify the group within your practice that will prioritize your practice guidelines.
- This will include some or all of the providers in your practice. It may be helpful to keep this group small.
- Discuss how to handle differences of opinion regarding importance and timing of services.
- Recall the purpose of this activity—to develop an agreed-upon practice guideline on which to base your preventive services prompting system. Strive for agreement on a minimum set of services required for all your patients. Individual providers can always do more.



- Strive to reach consensus about periodicity of visits among the clinical staff in your office.
- Your office could link visits to typical transitional times in children's lives, such as entering kindergarten.
- Partner with school nurses and school-based health centers to determine your office priorities for your patients.
- These individuals and agencies are important sources of information about the children in your community.

2. Define the preventive services prompting system for your office.

- Obtain the most current immunization schedule and screening recommendations.
 - Review Appendix C in *Bright Futures: Guidelines for Health Supervision of Infants, Children, and Adolescents*, 3rd Edition.
 - Consider the state Department of Public Health as another resource.
 - Consider revising an existing prompting sheet.
- Consolidate opinions regarding the importance of services and recommended timing.
 - Limit circular discussions by agreeing in advance about your goals.
 - Attempt to summarize areas of disagreement and use data and scientific literature to inform your final decisions.
- Prioritize which services to emphasize.
 - Use the *Bright Futures: Guidelines for Health Supervision of Infants, Children, and Adolescents*, 3rd Edition, coupled with information about your patient population to decide which services to emphasize.
 - Consider placing greater emphasis on those problems for which the burden of illness in your patient population is substantial and where there is stronger evidence that interventions in a clinical setting make a difference.

- Consider expanding the entries on your PSPS.
 - Include prompts beyond clinical preventive care. Such prompts can help support the health care team in being sensitive and aware of issues that can have implications for providing high quality care.
 - It is important to use culturally sensitive approaches to the following:
 - Psychosocial prompts such as discipline, maternal depression, home visitors, or other counseling and coordination services
 - Prompts regarding literacy, special health care needs, language barriers, and translator needs
- Adapt existing chart tools, use the samples in this toolkit, or develop a new one. Use a sign-off system that allows staff to review the final product prior to printing.

3. Test new ideas.

Your team can conduct small tests to check your new system, determine how to integrate the tools into practice flow, and identify further refinements needed before expanding to the entire office. Include health care professionals and staff in this process.

- When mapping your office flow, include steps for reviewing the PSPS, prompting, and documenting services given to the patient.
- Build reminders and prompts into new routines whenever and wherever possible.
- It is particularly easy to forget new steps when the day is busy. Be sure to get input from staff performing new routines about what types of prompts might be helpful (sticky notes, signs, stickers, materials, etc).
- Test seemingly minor details.
 - Where in the chart should a new PSPS be placed?
 - How to document information on the PSPS.
 - This often requires repeated experimentation.
- If your office has an electronic record, determine how to have the system prompt providers about needed services at every visit.



- Establish roles and responsibilities to support implementation.
 - Who needs to screen the PSPS tool?
 - When should screening occur?
 - Who will document information on the PSPS?
 - What documentation is needed (a date, a test result, etc)?
 - Who will ensure PSPS tools are in the charts?
 - How will you exchange information with day cares and community agencies?

For new strategies and tools to spread office wide,

- Write instructions for staff on new tools and approaches. For example, describe who needs to review a new prompting tool and when that review should occur during the patient visit.
- Standardize the wording of questions or prompts. For example, posting a set of assessment questions in the examination rooms for all providers to use is one way to standardize language.
- Communicate with staff about your new preventive services prompting system.
 - Use your existing meeting structure for training staff about the new system.
 - Share information about how changes will impact different jobs.
 - Describe how this change will impact patient care.

4. Solicit parent and staff feedback about the system.

- Ask parents their opinion of the visit.
 - Ask patients about what your office could do to support them with appointments and keeping track of services. For example, parents often appreciate a prompting sheet that captures data for camp and school physicals.

- Ask about the best way of communicating with parents and note that information in their chart.
- Rather than asking parents their opinion directly, consider using simple written surveys. Surveys do not need to be highly formal, but it is important to consider where and when parents will complete them and to share how the data will be compiled and used with parents prior to completing the survey.
- Be mindful of language and cultural issues when soliciting patient feedback.
- Ask staff their opinions of the new approach.
 - Ask about both benefits and barriers to the new approach.
 - How do tools help or hinder the routines?
 - Can staff identify unexpected benefits of using this approach?

Common Barriers to Using Preventive Services Prompting Systems

Barrier	Solution
Backfilling in charts	Choose an age and start using the PPS with those patients.
Disagreement among physicians	Agree to disagree and try the PPS on a few patients.
Medical record policy of institution	Consider policies ahead of time and plan for processing through system.
Lack of clarity about who is doing what	Create a process flowchart for using the PPS and review in a team meeting.
Duplication of immunization records	Some duplication is unavoidable, but your team can plan how to minimize duplication by determining various purposes for the PPS.

