

Sample Office Policy Worksheet:

What is Everyone's Role?

While in the Waiting Room

- Ask the patient to complete a questionnaire to provide information on risk, status, screening history, and attitudes.
- Place informative and attractive posters or fliers in the waiting room or exam rooms as an expression of your own policy and as cues to action.
- Customize the use of educational instructional materials, and reminder tools to suit your practice needs.

Enter staff responsible here: _____

At Patient Check-In

- Have staff ask about preventive care and highlight services that are needed or past due.
- Use preventive care flow sheets and reminder chart stickers.

Enter staff responsible here: _____

During the Visit

- Ask patients about family history and previous screening.
- Let your patients know that getting CRC screening can prevent cancer and save lives.
- Schedule screening before the patients leaves the office.

Enter staff responsible here: _____

Sample Office Policy Worksheet

At Checkout

- Have patients fill out reminder cards. File reminder cards by the month and year of planned notification.

Enter staff responsible here: _____

Communication Beyond the Office

- Contact patients in need of preventive services for the following month.
- Send patients a stool blood test in the mail in anticipation of a visit.

Enter staff responsible here: _____

Tracking Patient Compliance

Assure that changes to an office visit achieve what is intended by tracking patient compliance. Here are suggestions for techniques:

- On a periodic basis, pull charts of patients in the “screening completed” file to see if results are on the chart.
- Track patient compliance by phone to verify screening or provide a reminder for those who were given a referral. If screening is already done, mark this on the tracking sheet or place a copy of the results in a “screening completed” file.
- Perform ongoing preventive service assessments at the time of the visit and document them.
- Use patient personal health record booklets and encourage all patients to bring their records to every visit.

Enter staff responsible here: _____