This is an excerpt from the full AHRQ Health Literacy Universal Precautions Toolkit, Second Edition, available at http://www.ahrq.gov/literacy.

Follow Up With Patients — Tool 6

Overview

Followup is the act of making contact with a patient or caregiver at a later, specified date to check on the patient's progress since his or her last appointment. Appropriate followup can help you to identify misunderstandings and answer questions, or make further assessments and adjust treatments. In addition, followup helps to promote a good working relationship between you and your patients.

Actions

Decide on the reasons for followup.

For example, you can follow up to:

- Monitor health
- Reinforce knowledge and action plans
- Confirm medicine regimens
- Schedule appointments
- Verify followthrough on referrals
- Share lab results

Ask patients to record information.

- An excellent way to monitor health is to have patients track key clinical values and share that information with you between visits.
- For routine monitoring (e.g., blood sugar, blood pressure, weight), patients can record their values. This can be done using simple forms. The Blood Sugar Log Sheet is an example of a monitoring instruction sheet for a patient with diabetes to monitor treatment goals and blood sugar levels.
- Instructions to patients should include directions to contact the practice when their clinical values are of concern (e.g., blood pressure above 140/90, weight gain of more than 2 to 3 pounds in a day for heart failure patients).
- Be sure to thank patients for recording this information, highlighting how helpful it is, and providing clinical feedback (e.g., "It looks like you are doing a good job of keeping your blood sugar under control.").

Identify who will follow up with patients.

Who follows up depends on the purpose of the communication:

- **Primary Care Clinician.** If the followup is complex or sensitive, the primary care clinician may need to follow up.

- **Nurse and Medical Assistant.** Nurses and medical assistants have the training and expertise to follow up with patients to review things like blood pressure and blood glucose values. Nurses can also discuss and encourage specific health behaviors, review medicine adherence, and clarify lab results sent through the mail.
- **Pharmacist.** A pharmacist, if you have one on site, is an ideal clinician to follow up with patients about their medicines.
- **Other office staff.** The front desk staff can follow up with patients to schedule appointments, confirm that patients have followed through with referrals, and provide patients with information about community resources.

Choose the ways your office will follow up.

- **Phone.** Talking on the phone allows patients to ask questions and staff to reiterate important points.
- Secure email. Secure email is part of many patient portals and can be an effective way to communicate with patients. Make sure your emails are easy to understand (e.g., do not use medical jargon), and be sure to tell patients when and how often you check email. Sensitive health and personal information should not be sent through unsecured email.
- **Texting.** For patients who use text messaging, this approach can be effective for sending patient reminders and answering quick questions. Be sure that patients are willing to be contacted in this manner, as they may be charged for receiving texts from your office.
- **Postal mail.** Postal mail can be used to share information, such as normal lab results and appointment reminders. This Lab Results Letter provides an example of an easy-to-read letter reporting test results.
- **Automated calling system.** These types of systems can be used for reminders and to collect information from patients (e.g., blood pressure). You can type “automated calling system” into an Internet search window to find businesses that offer these services.

Initiate and track followup.

- Work with your clinical colleagues to identify the types of patients who would benefit from followup (e.g., patients recently prescribed blood thinners).
- Identify the appropriate schedule for followup (e.g., after a dosage change).
- Establish systems for tracking followup through the electronic health record (EHR) or by using a computer-based calendar.
- Identify the staff members who will update these tracking systems.

Track Your Progress

Select the records of a sample of patients who should have received followup after a recent visit (e.g., patients with heart failure). Count the number of patients who received followup actions that were scheduled in your tracking system. Count the number of followup actions (e.g., phone calls, emails, letters, automated calls) that were performed within the desired time frame. Note what was achieved by the followup contacts: medicine changes, referrals made, clarification of medicine regimens.