

# Health Professions Education Institute (HPEI)

**Title:** Addressing Healthcare Maintenance in Primary Care: Creating a SmartPhrase to Ease Caregiver Documentation Burden

**Presenter:** Alyssa Simon, MD

**Co-authors:** Samantha Nguyen, DO; Jessica Valente, MD; Sean Hernandez, MD

## **WORKS IN PROGRESS**

*Background/Needs Assessment:* According to our recent survey of AHWFBH Internal Medicine (IM) residents, most IM residents found addressing healthcare maintenance at their primary care visits crucial but identified time constraints as a major barrier to proper discussions. Furthermore, residents were willing to spend five to ten minutes on healthcare maintenance during their patient visits. The current system in Epic regarding healthcare maintenance is cumbersome and time-consuming, leading to deficits in preventative care.

*Objectives:* The goal of this project is to increase the efficiency of addressing healthcare maintenance for IM residents and overall improve preventative patient care in resident primary care clinics.

*Methods/Description of Program:* We are creating an Epic SmartPhrase that pulls data involving cancer screening, risk factor screening (such as Hepatitis C and HIV testing), immunization records, and other non-cancer preventative care topics (such as DEXA screening for osteoporosis). Residents will choose which topics to address in their visits by selecting from a drop-down menu (or SmartList) within the SmartPhrase. This will serve as a memory tool, decrease time spent gleaning prior health maintenance information within the chart, and ease documentation burden on caregivers.

*Anticipated Results/Evaluation Plan:* Once this SmartPhrase is finalized, we intend to analyze its efficacy and impact upon healthcare maintenance gaps by evaluating the number of age-appropriate screening tests ordered pre- and post- smart phase implementation. We will also gather resident provider satisfaction data using a post-implementation survey. Our hope is to see an increase in appropriate screening tests ordered after SmartPhrase initiation and a more positive experience created for residents when addressing healthcare maintenance.

*Next Steps:* With these results, we hope to create a system-wide smart phrase that serves as a foundation for addressing healthcare maintenance that we can further build upon to continue to provide excellent care for our vulnerable patients.