PRACTICE PEARLS

Ask about patients' future plans

Many times in busy practices, patient visits can become monotonous and businesslike and lose the human touch. To mitigate this, I end my visits by asking patients about their future plans – such as family reunions, graduations, or vacations – and write the information down in the progress note. During follow-up visits, I refer to these notes and ask my patients about these events. A good number of patients are surprised and appreciate that I am paying attention to their lives, not just their health.

Mohammed Basha, MD
Gainesville, Fla.

Use color-coding to manage patient documents

Even with the increasing use of electronic health records (EHRs), paper documents containing patient information have not fully disappeared in the typical family medicine practice. It can be challenging to appropriately manage these documents while protecting patient confidentiality.

In our office, we use a color-coding system that indicates how urgently a document needs to be managed and the type of action required.

A red folder means the document inside needs to be dealt with right away. Blue indicates the matter is routine. Yellow signifies the document needs to be scanned into our EHR. Documents placed in a green folder are for shredding. Buff-colored folders hold administrative documents not related to patients.

Our office also has rules for how the folders are used. Most importantly, we never put documents for different patients in the same folder to avoid sending documents to the wrong patient. Most offices already have a system where clerks pick up and deliver documents several times each day. Our clerks must also distribute the empty color-coded folders where documents are generated so they are readily available.

This approach helps everyone in our office know which documents they need to act on first and simplifies identifying items that must be either scanned into the EHR or shredded. It can be easily modified to meet your office's specific needs.

Jay G. Mercer, MD, CCFP, FCFP
Ottawa, Ontario

Update deceased patients' records

Many physicians may be unaware of a patient's death until they attempt to contact that person. To avoid this, we have a staff member check the daily obituaries. If she learns of a death we didn't already know about, she updates our practice management system and notifies the primary care physician.

This approach makes our quality metric reporting more accurate and serves as a backup if a family member or hospital does not notify the practice of a patient's death.

Kenneth G. Adler, MD
Tucson, Ariz.

FPM

WE WANT TO HEAR FROM YOU

Practice Pearls presents readers' advice on practice operations and patient care, along with tips drawn from the literature. Send us your best pearl (250 words or less), and you'll earn $25 if we publish it. We also welcome questions for our Q&A section. Send pearls, questions, and comments to **fpmedit@aafp.org**, or add your comments to the article at **http://www.aafp.org/fpm/2016/0700/p39.html**.