POLICY FOR TEST RESULTS TRACKING AND FOLLOW-UP (EMR)

Practice Name _____________________________

Purpose:
The purpose of this policy is to use a standardized tracking system to ensure needed tests are received, results are communicated in a timely manner, and follow-up care is received.

Policy Statement:
It is the policy of this practice to ensure that all staff is trained in the tracking and follow-up of labs and diagnostic tests ordered by the provider. It is the policy of this practice to track all labs and test results in a timely manner and to record the results into the patient’s medical record.

General Procedures:
I. Ordering Tests
   A. Clinical or clerical staff members monitor the JHN Compass daily to identify patients who are in need of testing/diagnostics prior to an upcoming appointment.
   B. The staff contacts patients who are identified by the JHN Compass to order tests/diagnostics according to the standing orders that are in place at the practice.
   C. Tests and diagnostics that are ordered through the EMR will be automatically stored in orders management. All others will need to be documented in the medical record.

II. Track Test Results
   A. As results/consult notes arrive via fax, mail or hospital delivery, they are stamped by the clerical staff with the day’s current date.
   B. Results/consults are marked as complete in the EMR by the clerical staff.
   C. Labs that are completed at Henry Ford Allegiance Health facilities will have the results automatically entered into the patient’s medical record via EMR and marked as complete. The staff will monitor orders management to effectively track these results.
   D. A report is generated and worked on a daily basis by a clerical or clinical staff member to ensure that the patient has completed their lab or kept their diagnostic test appointment and that the results have been entered and marked as complete in the EMR.
   E. If the results are not received within one week of the scheduled lab or diagnostic test, the clinical or clerical staff will follow-up with the facility to verify that the patient kept their appointment.
   F. If the patient did not complete their lab or keep the diagnostic test appointment the patient will be contacted. We will make three attempts to reach the patient by phone about the requested tests. A letter is sent on the last attempt.
   G. All results and notes are recorded in the patient’s medical record.
   H. When a specialist recommends testing for a co-managed patient, the ordering PCP is responsible for all follow-up and clearly communicating test orders and test results to the partner provider.

III. Communicating Test Results
   A. All results are reviewed by the providers before communicating results to the patients.
   B. The first attempt to contact patients regarding abnormal test results via direct conversation, phone, text, or other secured messaging is within 48 hours by the clinical or clerical staff. After 3 failed attempts to contact the patient, on different days and at different times, generated correspondence is mailed to the patient to contact the office. For high priority results, a certified letter is mailed.
   C. The first attempt to contact patients regarding normal test results via direct conversation, phone, text, or other secured messaging is within 7 business days by the clinical or clerical staff. After 3 failed attempts to contact the patient, on different days and at different times, generated correspondence is mailed to the patient to contact the office. Generated correspondence may be mailed to the patient within 7 business days if the office elects to utilize this communication route.
Policy for Test Tracking and Follow-up – Page 2

D. All attempts of contacting the patient are documented in the patient’s medical record.

IV. Follow-Up Care
A. After communicating test results to the patient, the clerical or clinical staff will schedule any follow-up appointments or testing.
B. Follow-up appointments with specialists will be scheduled by the practice and the patient will be contacted with all the pertinent information for that appointment.
C. All follow-up tests and consults are recorded in the patient’s medical record.

V. Patient Demographics
A. At each visit, the patient is asked by the clerical staff to verify their demographic information.
B. An encounter form with patient’s demographics is printed for the patient to read and verify that their information, if necessary.
C. Patient contact information is also verified when a patient calls to schedule an appointment.

VI. Cancellations and No shows
A. Each time a patient no shows or cancels an appointment, the provider is notified and it is documented in the patient’s medical record by the clerical or clinical staff.
B. The notification states what the appointment was for and if the patient no showed or cancelled it.
C. A patient with 3 consecutive no shows is reviewed by practice management for possible discharge from the practice. Practice will follow payor guidelines for discharging a patient.
D. The provider will ask the clinical or clerical staff to contact the patient to reschedule any appointments that are high priority.

VII. Patient Non-Compliance
A. Patients who do not complete testing or fail to show up for a consult will be contacted by the clinical or clerical staff to discuss the reasons why they were unable to complete the lab, diagnostic test, or scheduled appointment. The medical record is flagged as a reminder to address these issues at the next visit.
B. Patient non-compliance may result in the patient being discharged from the practice.

VIII. Staff Training
A. All staff members are trained on all aspects of the test tracking and follow-up process.
B. Documentation of staff training will be kept on file.
C. Any updates to this policy and will result in prompt documentation and implementation. This will be communicated to all clinical staff and administration in a timely manner.

Policy and Procedure approved by __________________________
Authorized Practice Representative Date