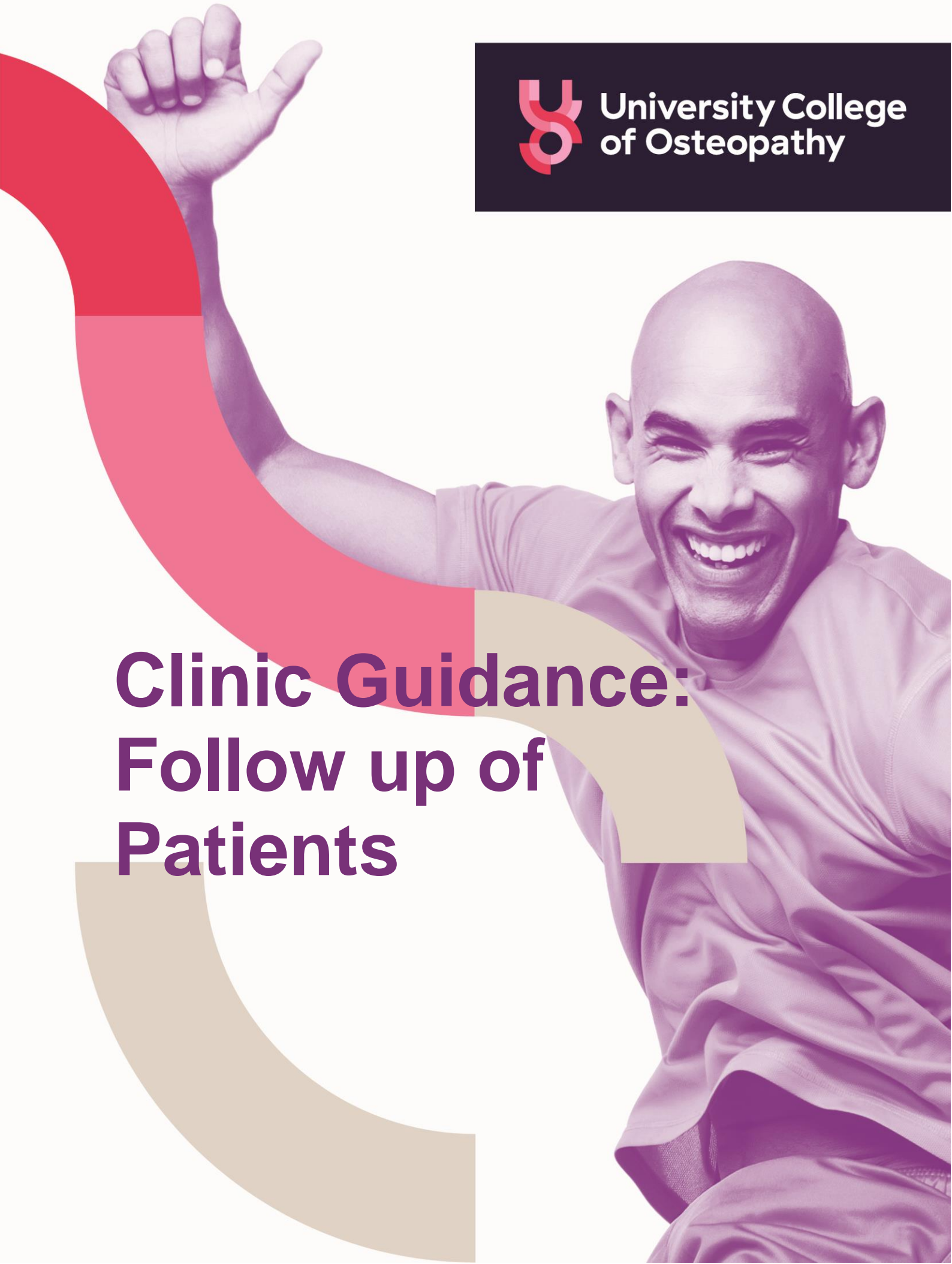




University College  
of Osteopathy

# Clinic Guidance: Follow up of Patients



## Clinic Guidance: Follow up of Patients

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Equality Impact					
Positive equality impact (i.e. the policy/procedure/guideline significantly reduces inequalities)					
Neutral equality impact (i.e. no significant effect)					X
Negative equality impact (i.e. increasing inequalities)					
<p><b>If you have any feedback or suggestions for enhancing this policy, please email your comments to: <a href="mailto:quality@uco.ac.uk">quality@uco.ac.uk</a></b></p>					

## CLINIC GUIDANCE: FOLLOW UP OF PATIENTS

### CONTENTS

1. Scope .....	4
2. Introduction .....	4
3. Re-booking Patients.....	4
4. Patient Non-attendance .....	5
4.1 New Patients (NP's) .....	5
4.2 Ongoing Patients (OP's).....	5
5. Record Keeping .....	5

## 1. SCOPE

- 1.1 This guidance document sets out to provide some advice for novice practitioners on the follow up of patients. Novice practitioners are often understandably overwhelmed by the clinical environment in the initial stages, when they are leading the clinical encounter and so this guidance sets out some simple actions that can help to better support patients.

## 2. INTRODUCTION

- 2.1 As a central part of developing a busy and vibrant practice, it is important to remember that your responsibility for the patient extends beyond the consultation room. Ensuring that patients are responding to treatment or are kept up-to-date with the progress of their case may require qualified practitioners to keep in touch over the phone. It is also important that whilst in practice, patients who fail to attend appointments are contacted to identify why.
- 2.2 To this end it is important to develop and practice these skills at the BSO, so that your list is maintained, and that patients are given an opportunity to give feedback or comment on how they are doing. It is also very re-assuring for patients to be contacted by their practitioners, and strengthens the therapeutic relationship.
- 2.3 This document is designed to provide a guide to novice practitioners with regards how to go about this whilst a student at the BSO and also to be clear about what is expected of practitioners.

## 3. RE-BOOKING PATIENTS

- 3.1 As the primary practitioner responsible for patient care, if your patient needs further treatment sessions, you are expected to make sure that your patients re-book to see you if at all possible. Patients benefit from continuity of care and you are able to reflect on their progress and appreciate how your treatment and management affects a response.
- 3.2 To make sure that your patient re-books with you, you are expected to have an awareness of when you might have appointments available for your following clinic sessions, ensure that your patient knows who you are, and when you are in clinic. Do not assume that a patient will 'ring in' to make an appointment in the future; it is not uncommon to find that unless an appointment is made then and there, your patient may rebook with another practitioner or forget and may not actually get back in touch.
- 3.3 The following points are aimed at helping you with this process:
- Before you start your clinic session, look at your list for your following clinic sessions, so that you are able to negotiate with the patient when you would be able to see them
  - Provisionally agree a time and a date with your patient for their next appointment so that the patient is able to discuss this when they get to reception.
  - Accompany your patient to reception and ensure that the receptionist is able to make an appointment for your patient that suits your mutual schedule if possible (do not assume that your patient will necessarily remember who you are).

- d) Ensure you have asked for your patients consent to ring them if necessary, so that if circumstances change prior to their appointment, you can ring them to re-schedule their appointment
- e) At the end of your clinic session review your day and check to see if your patients have rebooked with you.
- f) If you are unable to see a patient, try and make sure that if they see another student in the meantime that they rebook with you the following week, so you are able to retain them on your list.

#### 4. PATIENT NON-ATTENDANCE

##### 4.1 NEW PATIENTS (NP'S)

- 4.1.1 If a NP fails to attend their appointment it is the responsibility of the clinic reception team to make every effort to contact that patient to find out the reasons for this and rebook them if appropriate.

##### 4.2 ONGOING PATIENTS (OP'S)

- 4.2.1 If a patient contacts us to let us know that they are going to be late or are unable to attend, the reception team will try to rebook this patient with you at a later date and will inform you of the situation if appropriate.
- 4.2.2 If an OP fails to attend for their appointment (ie they are more than 20 minutes late) it is the responsibility of the student to attempt to contact the patient so as to identify why.
- 4.2.3 Before you contact your patient ensure that consent has been obtained to call the patient.
- 4.2.4 Please make sure that you inform your tutor that you are intending to do so that they can be on hand to assist you.
- 4.2.5 You are allowed to make use of the telephones in the reception back office for the purpose of ringing patients; simply ask one of the reception team and they will assist you.
- 4.2.6 If a patient needs to book a new appointment, it is your responsibility to ensure that a receptionist then deals with the patient (either by transferring the call, or having the receptionist call the patient back), so that the booking can be made promptly.
- 4.2.7 If you are not able to make contact with a patient, it is best practice to keep a record of who the patient was and attempt to contact them at a later date, rather than not follow them up.
- 4.2.8 All contacts (whether successful or not) should be recorded on the patients records, with the relevant details recorded appropriately.

#### 5. RECORD KEEPING

- 5.1 In all instances the recording of patients' attendance should be made on the patients records, along with any contact history and conversations made, so that you or colleagues are able to monitor any ongoing situations effectively.

- 5.2 Record the date and time of contact, along with any points relevant to the care of your patient and for future reference/referral.
- 5.3 Ensure that you sign any records
- 5.4 Ensure that, before you ring your patient or leave a message, you have their consent to do so. If in doubt do not contact them but make a note for the next appointment, so that consent can be obtained.