

# FY 18 BCCNP Evidenced Based Interventions: Client Reminders Implementation Phase

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## Section 2: Framework for Implementation

Section 1 dealt with developing your plan for Client Reminder EBIs. In this Section a review of steps to help in implementing your plan is discussed. At the end of this document is an EBI Implementation Worksheet to help with documenting the activities you will implement for Client Reminders in your clinic.

### Pre-Implementation

#### **Step 1: Understand Existing Systems that Can Support Client Reminders- Questions to consider.**

1. Does your clinic have an existing client reminder system in place?
  - What works well with the current system?
  - What could be improved with the current system?
2. Create a flow chart of all clinical and administrative processes relevant to the client reminders. This will provide a clearer understanding of your current practice, where changes need to be made, and who will make the changes. Some processes to include in the flow chart are:
  - Process for identifying patients needing reminders or recalls; for example, who is responsible for generating a list of patients needing screening through the electronic medical record system?
  - Process for ensuring written reminder letters be generated and mailed
  - Process for documenting if a patient completed a screening; for example, mammography may be completed outside of the practice; who is responsible for obtaining mammography result information and recording it in the patient record?
  - Process for ensuring client reminders for subsequent screening.

#### **Step 2: Determine the Scope and Type of Client Reminders to Use**

1. Scope of Client Reminders- Questions to consider.
  - How will you tailor your client reminders to the populations you serve in your clinic? For example, if your client population experiences lower literacy levels, would a telephone call work best?
  - Will your client reminders be designed with messages that:
    - Apply to an entire target population (i.e. mammography reminders for women age 50 and older) OR

- Tailored to a specific individual based on that individual’s characteristics,
    - Family history of breast cancer,
    - Last screening date (I.e. all women due for screenings in a certain month),
    - Other screenings they may need, (women due for both breast and cervical screenings) etc.
  - Will you focus on a certain type of cancer, or multiple cancers? (I.e. breast cancer only, cervical cancer only or breast and cervical cancer). This should be dictated by your patient population, practice type, and baseline data).
  - Will you send a reminder to:
    - All those who are due for a routine periodic screening (e.g. annual or bi-annual mammogram) or
    - Incorporate reminders or recalls to those who are overdue for services (reminder has already been sent)
2. Types of Client Reminders – Questions to consider
- What types of reminders do you plan to implement in your clinic setting?
    - Written – mailed letters and postcards, emails, etc.  
[See Appendix A](#) for an example of a mailed letter  
[See Appendix B](#) for an example of a Telephone script– both direct calling and automated messages  
[See Appendix C](#) for additional resources
  - The type of reminder you will use will be based upon your existing resources and capacity to expand existing reminder efforts.
3. Will you use enhanced reminders?
- Enhanced reminders or recalls are sent to those individuals who are overdue for services (First reminder has already been sent).
  - Enhanced reminders can be:
    - Written information or text with information about indications for, benefits of, and ways to overcome barriers to screening.
    - Personal telephone reminders by staff offering assistance in scheduling appointments.

### **Step 3: Build Buy-In and Support**

1. Clinic staff buy-in and support is crucial for implementation of client reminders to be successful.
2. Ways to elicit staff buy-in and support include:
  - Identifying a lead staff person who is committed to the process of implementing client reminders. This is your “go to” person that will be able to address questions that arise from providers or staff about the client reminder intervention.

- Educate staff about benefits, goals and objectives of client reminder EBI and how success will be measured. Use data to demonstrate the need for the increasing screening rates, and supporting high-quality processes.
- Be up front on how the implementation process will affect day-to-day activities, so that staff knows what to expect. Will duties and responsibilities of some staff change? Seek input from staff on their concerns about implementation of the client reminder and ways to improve it.
- Keep administrative and medical staff that will have some direct or indirect role in establishing or maintaining the client reminder updated in the implementation process.

#### **Step 4: Assure Adequate Resources are In Place**

1. Does your clinic have sufficient funds and staff that will be committed to implementation of the Client Reminder system?
2. What specific resources/staff are needed to:
  - Identify specific patients who should receive reminders
  - Compose tailored letters and messages, as well as follow-up letters and messages for patients
  - Create and oversee automated telephone messages
  - Provide computer support, such as software or updates to existing software or electronic medical records that allows for identification of patients:
    - Needing reminders
    - Undergoing screening after receiving the reminders
    - Undergoing additional testing or care as indicated after initial screening test
  - Will staff have enough time to:
    - Set up and deliver client reminders, including enhanced reminders
    - Use existing data systems to generate lists of patients needing reminders

#### **Step 5: Incorporate Evaluation Strategies**

1. Throughout the implementation stage, ask how you will evaluate your progress and outcomes prior to putting the client reminders in place.
2. Plan to use process and outcome data to understand how the client reminder is working:
  - Sample process evaluation question: How well is the reminder system working within the clinic setting (is it easy to use, are staff satisfied, etc.)?
  - Sample outcome evaluation question: Are patients being screened (screening completion) because of the client reminder?

#### **Step 6: Plan Staff and Provider Orientation**

1. Determine how you will orient or introduce all staff and providers to the client reminder intervention.
  - This could be done during a lunch and learn session or staff meeting.

2. Plan to share with staff and providers the purpose and overall goal of the intervention, the intervention benefits for patients and staff/providers, and the various roles and responsibilities of staff and providers with client reminders.
3. Be prepared to answer questions from providers about why this intervention was chosen, and how much time it will take. Rely on your champions to help address these questions.

## Implementation

### Step 1: Conduct Staff and Provider Orientation

1. Share with staff and providers how the client reminder intervention will be conducted.
2. This in-person orientation session should include review of the following:
  - Purpose of the intervention and timeline
  - How client reminders will work – what type of reminders will be used, who will be responsible for generating reminders, etc.
  - How the effectiveness of the client reminders will be assessed, evaluation steps, etc.
  - Tools available to administrative and clinical staff to help implement reminder system (e.g. follow-up phone scripts, reminder letter templates, etc.)

### Step 2: Create Client Reminder Materials

1. Create and finalize the client reminder materials (written or verbal) to support your planned intervention.

### Step 3: Implement the Client Reminder

1. Determine when the client reminders will be sent, and have all the necessary tools and staff in place.
2. Manually or electronically identify patients who will receive a client reminder.
3. Send and document the client reminder and schedule any enhanced reminder processes you have built into your intervention (follow-up letters or text, additional phone calls, assistance with scheduling appointments, etc.).
  - As part of follow-up, determine the time between reminders, i.e. how long do you wait to provide a second reminder if the patient has not responded to the first reminder.

## Evaluation

### Step 1: Monitor Progress During Implementation

1. It is important to monitor how implementation of the client reminder is going (process measures), while the intervention is being done.
2. Convene those responsible for implementing the client reminder on a regular basis to ask questions about how the intervention is going, including the ability to complete enhanced client reminders (follow-up letters, phone calls, etc.) in a timely manner, accessibility of data to identify those in need of a reminder, etc.
3. Monitor initial outcomes to see how effective the client reminder is. For example, are those receiving reminder letters or phone calls setting up appointments for screening?

## **Implementation Worksheet**

Complete the following worksheet, based on the implementation framework steps above, to determine what you have and what you need to implement client reminders in your practice.

Client Reminders Implementing the EBI Process	Do we have this in place or are we ready to implement?			What to Improve or Develop	Who will do this	Timeline
	Yes – we have this, we’re ready	Yes – but improvements are needed	No - not in place, not ready			
Existing System can support Client Reminders						
Scope of Client Reminders  Population specific or individually tailored						
Types of Client Reminders  Initial Reminders used: written or telephone  Enhanced Reminders used:						

Client Reminders Implementing the EBI Process	Do we have this in place or are we ready to implement?			What to Improve or Develop	Who will do this	Timeline
	Yes – we have this, we’re ready	Yes – but improvements are needed	No - not in place, not ready			
Staff Buy in/Support						
Resources In Place						
Implementation Phase Staff Orientation Developed						
Client Reminders Developed						

Client Reminders Implementing the EBI Process	Do we have this in place or are we ready to implement?			What to Improve or Develop	Who will do this	Timeline
	Yes – we have this, we’re ready	Yes – but improvements are needed	No - not in place, not ready			
Implementation Plan Finalized: Kick-off date identified						
Process for continuous evaluation identified						

## Appendix A: Client Reminder Letter Example

Date

Dear Fname Lname,

A few weeks ago, we mailed you a post card/letter with a reminder that you are due for a mammogram/Pap test. Our records show that you have not yet received the test(s). If you have already scheduled your appointment for your Pap test and/or mammogram please disregard this letter.

If you need to schedule an appointment for a Pap test please call our office at \_\_\_\_\_.

If you need to schedule your mammogram please call \_\_\_\_\_ to schedule an appointment.

Breast cancer and cervical cancer screening are important. Receiving Pap tests and regular mammograms can help find cancer early when it is most treatable.

Your health is important to us. If you have any questions about these screening tests please contact us at \_\_\_\_\_. Thank you.

## Appendix B: Mammogram/Pap test Follow-up Phone Script for Average-Risk Individuals

Introduction: Good Morning/Afternoon. May I speak with \_\_\_\_\_?  
(Note: Due to HIPAA regulations, the conversation should not proceed unless speaking directly with the patient.)

My name is \_\_\_\_\_ and I am calling from \_\_\_\_\_.  
We are calling to remind you to schedule your Pap test and Mammogram. Do you have any questions about these tests? We are calling everyone who has not yet had these tests to see if we can help you in scheduling a visit at our clinic and in scheduling an appointment for the mammogram.

Breast and cervical cancer screening is very important. Each year, hundreds of thousands of people are diagnosed with or die from breast, and cervical cancer. Appropriate screening for these cancers can lead to early detection, more effective treatment, and fewer cancer deaths.

Can I make an appointment for you to come to the clinic for a Pap test? Where would you like to go to have your mammogram? Do you need the phone number to schedule an appointment?

Ms. \_\_\_\_\_ Thank you for your time today. Do you have any questions? If you need further assistance scheduling your mammogram please give us a call at \_\_\_\_\_.

Note: Please document and track these conversations.

## Appendix C: Deeper Dive

### Summary of Task Force Recommendations and Findings

Click here to go to the Community Guide information specific to client reminders:

<http://www.thecommunityguide.org/cancer/screening/client-oriented/reminders.html>

### Links to Resources and Templates

[Effectiveness of Interventions to Increase Screening for Breast, Cervical, and Colorectal Cancers: Nine Updated Systematic Reviews for the Guide to Community Preventive Services.](#) Sabatino et al / Am J Prev Med 2012;43(1):97–118.

- [Increasing Population-based Breast and Cervical Cancer Screenings: An Action Guide to Facilitate Evidence-based Strategies](#)

CDC's [A Guide to Facilitate Health System Change](#)

From Research-tested Intervention Programs (RTIPS):

- Programs using client reminders to increase breast cancer screening:  
[http://rtips.cancer.gov/rtips/rtips\\_search.do?topicid=4&cg=5&choice=cguide](http://rtips.cancer.gov/rtips/rtips_search.do?topicid=4&cg=5&choice=cguide)
- Programs using client reminders to increase cervical cancer screening;  
[http://rtips.cancer.gov/rtips/rtips\\_search.do?topicid=5&cg=5&choice=cguide](http://rtips.cancer.gov/rtips/rtips_search.do?topicid=5&cg=5&choice=cguide)

### Success Stories

Increasing employee cancer screening rates with client reminders in Michigan:

<http://www.thecommunityguide.org/CG-in-Action/CancerScreening-MI.pdf>

Assisting clinics with client reminders by providing an automated phone call system:

<http://www.thecommunityguide.org/CG-in-Action/CancerScreening-NY.pdf>