



## **Making the Most of the Follow-Up Visit**

It's not enough for a patient to keep their follow-up appointment – the appointment must also be a good one. Here are important reminders for a clinician, particularly useful during the discharge process, to maximize the quality of the first and subsequent follow-up visits for a patient with HF and/or AMI.

### **Step 1: Help your patients come prepared to their appointment**

**Call your patients at least one day before their appointment to remind them they have a scheduled follow-up visit. Also, remind them to bring to the appointment:**

- A written/typed list of all current medications or their pill bottles
- Copies of recent lab results and test results since discharge and/or their last clinic visit
- A list of their current health care clinical team with medical reasons why each is being seen
- If not available via EMR, a document of their health history to include:
  - Any surgical procedures with approximate dates
  - Prior or ongoing illnesses/health issues
  - A list of any medical tests, especially if performed within the last year
  - Relevant family health history

### **Step 2: Important communication reminders for the first follow-up visit**

**During a first follow-up visit with a HF and/or AMI patient, try to ask the following questions:**

- Tell me about your heart disease (HF or AMI). How have you been doing lately?
- What symptoms bother you the most?
- Help me to understand what is important to you about your healthcare.
- Are you having any difficulty following your treatment plan?
- Are you taking your medicines everyday as directed?
- Are the prescribed medicines causing any side effects that so far?
- It's recommended that you weigh yourself daily. Do you have a scale at home? Are you weighing yourself every day?
- How are you sleeping? Are you having difficulty falling asleep or staying asleep?
- Having heart disease can be stressful. How are you doing?
- How are you doing with your diet and exercise plan?
- Do you need help walking, eating, bathing, getting dressed, or with other activities?
- Do you have family, friends, or a community organization available if you need help with daily activities?





**Communicate the basic education components for patient self-care:**

- Name, purpose, frequency, and side effects of each medication
- The benefits of exercise and examples of activities
- Special diet recommendations and examples of types of food or feed preparation
- The importance of monitoring sodium intake
- Recognizing signs and symptoms of a worsening condition
- How to respond to worsening signs or symptoms
- The importance of monitoring one's weight on a daily basis
- The importance of being in touch with one's emotions
- The importance of health promotion and managing co-morbidities

**Remind patients:**

- Who to call if symptoms worsen
- Who to call in case of an emergency
- When they are expected back for their next follow-up appointment

**Step 3: Encourage patient engagement throughout their care**

The first follow-up visit should set the stage for a patient's care at home. The following questions can help ensure your patients are successfully adhering to their prescribed treatment plans between visits.

**General Well-being**

- How have you been feeling since your last visit?
- Have you experienced any chest pain, shortness of breath swelling, fatigue or tiredness?
- How are you sleeping?
- Have you felt "sad" or "hopeless" much of the time?
- What is your stress level?
- How has your condition affected your daily routine?

**Diet and Exercise**

- How have changed your diet?
- Are you eating fruits and vegetables?
- How have you limited your salt intake?
- Who is doing the cooking at home?
- What types of foods do you normally eat?
- How often do you eat out?
- How often do you participate in physical activities?



- What types of exercise do you do?

**Weight Management**

- Are you weighing yourself daily?
- Have you experienced a weight gain of more than 3 pounds?

**Medication Management**

- Have you been taking your medicines as prescribed?
- Have you experienced any side effects from your medicines?

## Step 4: Help your patients set realistic goals

Your Guidance on Goals	Examples for Your Patients
Focus recommendations on immediate behavior changes rather than long-term goals	Exercising every day, rather than losing 10 pounds in a month
Provide examples of activities that count as exercise and ask which they might enjoy	Light exercises: walking, gardening, playing darts, bowling, yoga  Moderate exercises: speed walking, swimming, dancing
Guide the patient to one or two small, realistic changes he/she can begin immediately	Buy sodium-free foods  Walk 10-20 minutes each day
Encourage the patient to create goals that involve positive action	Use lemon juice or herbs instead of salt for seasoning  Have spouse, friend, or child join you for a walk or other activity



### **Step 5: Help your patients stay on track with their goals**

- Remind patients that treatment can help them reach their stated goals
- Make the recommended treatment plan clear, concrete, simple, and understandable
- During each visit, ask patients to describe the actions they will begin immediately
- Have patients tell you why those actions are important to them
- Update treatment plan as patients introduce lifestyle changes in their daily routine
- Watch for signs of anxiety and depression and adjust treatment accordingly
- Refer patients to cardiac rehabilitation when helpful and appropriate