Bright Futures Mini Training Module Script

Agenda Setting in the Clinic

Introduction: In today’s world, often pediatric health care professionals and parents feel rushed with the 15 to 30-minute visits. Parents provide a great deal of information that is crucial to patient care. As pediatric health care professionals, we need to ensure we are obtaining an accurate history and addressing concerns without making others wait or making our own day even longer.

Take Away: Agenda setting allows for optimized health care delivery in the outpatient setting while maintaining a patient-centric approach.

Key Resources:


Note: The recommendations in this presentation/training do not indicate an exclusive course of treatment or serve as a standard of care. Variations, taking into account individual circumstances, may be appropriate.
Slide 1 - Bright Futures: Guidelines for Health Supervision of Infants, Children, and Adolescents, 4th Edition

Welcome to this Bright Futures mini training learning activity on Agenda Setting in the Clinic.

Slide 2 - Author & Disclosure Information

Please read and review the author & disclosure information before you continue.

Slide 3 - Pre-test

Please complete the pre-test prior to reviewing the presentation.

Slide 4 - Main Objective

As a result of completing this module, the learner will acquire a set of skills to facilitate appropriate agenda setting, within a Bright Futures health supervision visit, so the priorities of both the patient/parent and pediatric health care professional are addressed without sacrificing efficiency, customer satisfaction, or physician wellness. These are important skills to develop and hone regardless of where one is in their career.

Slide 5 - Scope of Pediatrics

Effective agenda setting has a direct impact on the patient – addressing the family's concerns, avoiding relevant omissions, and improving care satisfaction. Effective agenda setting also optimizes health care delivery by increasing timeliness and efficiency in practice.

Slide 6 - Agenda Setting in Clinic

Patients and parents often arrive with multiple issues to address during their visit. At times, the concerns they share with you are different than those provided to the scheduler or roomer. There are times concerns are not brought up, which can lead to problems for the health of the patient.

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Agenda setting is an important skill that improves not only patient care, but also pediatric health care professional’s wellness by reducing burnout. Remember, efficiency cannot be at the expense of patient care.

Slide 7-Agenda Setting in Clinic

- Often, patients, parents, and pediatric health care professionals feel rushed with the 15-to-30-minute visits. Patients and parents provide a great deal of information that is crucial to patient care. As pediatric health care professionals, we need to ensure we are obtaining an accurate history and addressing concerns without making others wait or making our own day even longer.
- As mentioned, honing this skill is useful for both new and experienced professionals.

Slide 8-Improving Equity: Agenda Setting

- Be careful not to make assumptions about the family unit, gender roles, or dynamics. Ask, rather than assume, and be careful of micro-expressions that may offer certain negative connotations.
- Be cognizant to respect cultural boundaries of personal space, eye contact, and actions such as pointing with a finger.

Slide 9-Agenda Setting-Steps

- Each of these steps will be discussed in the upcoming slides.

Slide 10-Case Example 1: Agenda Setting

- This is a typical example where the child is brought for a preventive visit and parent has several concerns. Most pediatric health care professionals are pressed for time but also want to avoid not addressing something important. However, pediatric health care professionals also worry about running late in clinic, getting notes done on time, and also being able to complete all required items per standard of care guidelines.

Slide 11-Visit Priorities

- Setting priorities and having the agenda is crucial. Shared decision making is important so that the patient and parent feel heard.

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Slide 12-Visit Priorities

- Parents should feel engaged in the care of their child and as such providers should encourage open communication. It is important to review items brought by the parent to ensure there is adequate oversight such that important items are not overlooked.
- Encourage the parent to provide the list ahead of the appointment so you can review. This can be accomplished by them sending the list via an e-portal message or perhaps by sharing the list with the rooming medical assistant.
- Discuss with the parent that you have reviewed all of the items and set the agenda early about what must be covered at this visit and what is safe to defer to another day. Include the parent in this discussion. Offer a video visit to cover some of the other items or even a phone call after the end of the business day to answer questions that may not have been fully addressed.
- Provide a date/time for the follow up visit so the parent feels secure the issues will indeed have an opportunity to be addressed.

Slide 13-Bright Futures Guidelines Priorities

- Here are the priorities for the 2 Year Visit from the Bright Futures Guidelines, 4th Edition.

Slide 14-Previsit Chart Preparation

- Pediatric health care professionals often walk in thinking the chart review takes too long. However, not reviewing the chart always ends up costing the pediatric health care professional more time. Reviewing the chart and updating the electronic medical record (EMR) allows you to already have risk stratified the patient. This way, you can then hear the concerns from the patient or parent with an appropriate context for the patient.

Slide 15-Establish Rapport

- Patients and parents appreciate thoroughness and will often forgive a little tardiness from the pediatric health care professional. Updating the histories and medications is a necessary part of each visit to avoid errors, prevent omissions, and to provide quality care.

Slide 16-Open Ended Questions

- Starting with open ended questions is always better than closed ended questions. With closed ended questions, you will only receive answers to your question. A great deal of information may be potentially lost. Sitting down and doing the interview also adds a great

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deal of perceived “time with the patient.” Don’t stand or rush this interaction. This is how you build rapport.

**Slide 17- Value of Shared Decision Making**
- Shared decision making and having family engagement is critical to optimize patient care.

**Slide 18-Previsit Questionnaire**
- Every practice is different. In the author's opinion, speaking to the parents often builds better rapport than the forms. It also allows a more interactive discussion.

**Slide 19-2 Year Previsit Questionnaire**
- Here we have the 2 Year Bright Futures Previsit Questionnaire. By reviewing the Previsit Questionnaire (milestones, risk assessment, and anticipatory guidance questions), it can provide the clinician a more thorough snapshot for the visit of how the child and family are doing. In this example, the parent listed a number of concerns to discuss.

**Slide 20-Sample Conversation Case 1-Baby**
- It is important to greet each person in the room. Make sure to ask about their relationship to the patient rather than assuming roles. Starting off by letting the family know what to expect is usually much appreciated.

**Slide 21-Sample Conversation Case 1-Baby (continued)**
- Providing an overview of what you will cover is important as many families don't have the buy in for wellness exams. They often feel if the child is fine and vaccines are up to date, then what is the need for the visit. Letting families know the breadth of what is addressed, as well as its importance to the well-being of the child, often allows more regular visits in the future.

**Slide 22-Sample Conversation Case1-Baby (continued)**
- An important step is engaging the family and thanking them for being proactive. Going over their concerns – whether fully addressed at this visit – or deferred to another visit is important. If deferring to another visit, validate the concern and reassure that deferring it for another visit allows more time to discuss in detail rather than the assumption the concern was just dismissed by the professional.
Slide 23-Resources for Families

Here we have the Bright Futures 2 Year Visit Parent Handout that can provide additional information to parents (and/or patient).

Slide 24-Summary: Teaching Points

Here is a check list of items that can assist you in agenda setting. Always remember that the first priority of every Bright Futures health supervision visit is to attend to the concerns of the parents and patients.

Slide 25-Post-test

Please complete the post-test prior to ending the presentation.

Slide 26-References