

TITLE

MISSED VISIT BY HOME CARE SERVICE PROVIDER**SCOPE**

Provincial Home Care Service Provider

DOCUMENT

PS-83-01

APPROVAL LEVEL

Senior Program Officer
Community, Seniors, Addiction & Mental Health

SPONSOR

Seniors Health

INITIAL EFFECTIVE DATE

March 8, 2016

CATEGORY

Patient Safety

REVISED

Not applicable

PARENT DOCUMENT TYPE & TITLE

Not applicable

NOTE: The first appearance of terms in bold in the body of this document (except titles) are defined terms – please refer to the Definitions section.

If you have any questions or comments regarding the information in this guideline, please contact the Policy & Forms Department at policy@albertahealthservices.ca. The Policy & Forms website is the official source of current approved policies, procedures, directives, and practice support documents.

OBJECTIVES

- To set out a provincial guideline for Home Care Service Providers regarding reporting of missed Home Care visits in the community.
- To demonstrate Alberta Health Services' commitment and responsibility towards **patient** safety and quality care by ensuring Home Care missed visits are reported and measured against a standard.

APPLICABILITY

Compliance with this guideline is required by all Alberta Health Services employees, members of the medical and midwifery staffs, Students, Volunteers, and other persons acting on behalf of Alberta Health Services (including contracted service providers as necessary) working in a Home Care community environment.

GUIDELINE ELEMENTS**1. Guiding Principles**

- 1.1 Home Care patients rely on Home Care services to maintain and support their independence, safety and well-being at home. Missed visits negatively impact Home Care service quality, as well as patient safety and satisfaction.

- 1.2 Missed visits are the exception. Patients should be informed in advance of a missed visit, whenever possible.
- 1.3 As part of good service and communication, Home Care Service Providers should contact patients in advance of any change to appointment time or schedule (e.g. running early or late), whenever possible, to inform them of the change.

2. Home Care Services Service Providers

- 2.1 For the purposes of missed visit reporting and measuring, Home Care services are:
 - a) provided by Alberta Health Services (AHS) Home Care Service Providers;
 - b) visits provided in home living settings and non-designated congregate living environments (e.g. lodges, home living patients); and
 - c) visits offered by a Registered Nurse, Licensed Practical Nurse and/or Health Care Aide.

3. Defining Missed Visits (Inclusion/Exclusion Criteria)

- 3.1 A **reportable missed visit** is any scheduled Home Care visit where the Home Care Service Provider fails to attend within the acceptable arrival time parameters set out in section 5 of this guideline.
- 3.2 A missed visit may be rescheduled in advance, and shall not be considered a reportable missed visit if the visit is rescheduled:
 - a) within the time requirements stated in the patient's care plan (e.g. weekly, daily, twice a day); and
 - b) with the patient's agreement.

Note: If the rescheduling does not happen in advance of the original visit time, it is considered a reportable missed visit.
- 3.3 Home Care Service appointments that are not completed for patient-initiated reasons are not considered reportable missed visits. Patient-initiated reasons for missed visits include, but are not limited to:
 - a) the Home Care Service Provider arrives at the patient's home and the patient is not home;
 - b) the Home Care Service Provider arrives at the patient's home within the acceptable timeframe and the patient refuses the visit; and
 - c) the patient cancels the visit by contacting the Home Care Service Provider in advance.

- 3.4 In the event the Home Care Service Provider deems the home environment to be unsafe for the staff member, the Home Care Service Provider shall call the Case Manager immediately. In this circumstance, if the visit is not provided, it would not be considered a reportable missed visit.
- 3.5 AHS may cancel or temporarily suspend visits when the service is not required and the visit shall not be considered a reportable missed visit.
- 3.6 Sometimes exceptional circumstances (e.g. emergency situations, natural disasters) prevent Home Care Service Providers from meeting arrival time parameters. These are reportable missed visits.
- 4. Required Essential Service Visits**
- 4.1 **Required Essential Service visits (RES)** are home visits for patients whose health is severely compromised, have no formal or informal supports to assist with managing health care needs, and whose health and safety would be at risk if the Home Care visit is not provided on schedule.
- 4.2 The Case Manager is responsible for identifying which patients receive required essential service visits.
- 5. Arrival Time Parameters for Appointments**
- 5.1 For routine visits, arrival within 60 minutes (before or after) the scheduled time is considered acceptable.
- Note:** Outside of 60 minutes, the Home Care Service Provider may attempt the visit. If the patient agrees, the visit shall be provided; however it is still a reportable missed visit.
- 5.2 For Required Essential Services visits, arrival within 30 minutes (before or after) the scheduled time is considered acceptable.
- Note:** Outside of 30 minutes, the Home Care Service Provider should attempt the visit. If the patient agrees, the visit shall be provided; however it is still a reportable missed visit.
- 6. Cancelled Visit: Patient-Initiated**
- 6.1 Home Care Service Providers shall notify the AHS Case Manager of any patients who have a pattern of patient-initiated missed visits. The Case Manager shall then follow up with the patient to determine obstacles to the delivery of services.
- 7. Missed Visit Performance Expectation**
- 7.1 The performance expectation for reportable missed visits shall be one (1) percent or less of the total number of visits scheduled for the Home Care Service Provider.

- 7.2 The missed visit performance expectation may be reviewed by AHS.
- 7.3 The missed visit performance of Home Care Service Providers shall be reviewed by AHS on a regular basis (the frequency shall be determined by the zone); longer term trends shall be reviewed as needed.
- 7.4 The formula to calculate missed visit performance:

Missed Visits Performance = Total Reportable Missed Visits / Total Scheduled Visits (per same time frame)

8. Missed Visit Tracking and Reporting

- 8.1 Home Care Service Providers shall report missed visits using the missed visit reporting template on a frequency determined by the zone.
- 8.2 Missed visit reports shall include the total number of reportable missed visits, the time of day and the day of the week of each missed visit.
- Note:** Refer to AHS *Missed Visit Reporting Template*.
- 8.3 Home Care Service Provider missed visits are self-reported and this should be noted as a limitation in data quality.
- 8.4 When a Home Care Service Provider does not meet the AHS missed visit performance expectation, AHS shall have a performance discussion with the Home Care Service Provider.

9. Documentation

- 9.1 The Home Care Service Provider shall document all missed visits (both provider and patient-initiated) as directed by specific zone documentation processes. This documentation shall include the date, time and rationale for the missed visit, in addition to the date and time of the rescheduled visit, and any alternative arrangements for patient care as required.

Note: Only reportable missed visits shall impact the performance measure.

- 9.2 Any issue or incident resulting from a missed visit shall be communicated by the Home Care Service Provider to the Case Manager. The Case Manager shall document these details in the patient **health record**. All adverse events shall be reported according to the reportable incidents process, as outlined in the AHS *Reporting of Clinical Adverse Events, Close Calls and Hazards Policy*.

DEFINITIONS

Health record means the Alberta Health Services legal record of the patient's diagnostic, treatment and care information.

Patient(s) means an adult or child who receives or has requested health care or services from Alberta Health Services and its health care providers or individuals authorized to act on behalf of Alberta Health Services. This term is inclusive of residents, clients and outpatients.

Reportable missed visit means any scheduled home care visit where the Home Care Service Provider fails to attend within the acceptable parameters.

Required Essential Service visit (RES) means a home visit for patients whose health is severely compromised and/or have no formal or informal supports to assist with managing health care needs, and whose health and safety would be at risk if the home care visit is not provided on schedule.

REFERENCES

- Alberta Health Services Governance Document:
 - *Reporting of Clinical Adverse Events, Close Calls and Hazards Policy (#PS-11)*
- Alberta Health Services Resources:
 - *Missed Visit Reporting Template*

VERSION HISTORY

Date	Action Taken
March 8, 2016	Initial approval/effective
March 2019	Scheduled for Review