
Tips for Evaluating New Patients Efficiently

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This fact sheet will help enhance your efficiency in conducting new patient evaluations. Developing a consistent approach will help mitigate the apprehension that trainees and early career clinicians often feel when faced with new patient assignments. The goal is for you to anticipate these evaluations with confidence, knowing you will complete them swiftly and proficiently.

Time required (30-90 minutes, depending on the patient)

- *Review the medical record and write your first draft of the evaluation: 15-20 minutes*
- *Interview the patient and fill in gaps in the template: 5-30 minutes*
 - 20-30 minutes for a cooperative, verbal patient
 - 5-20 minutes for an uncooperative patient or with a disorder that renders conversation difficult (eg psychosis, dementia)
- *Care coordination/information gathering: 15-30 minutes*
 - Contact informants (if the patient provides consent)
 - Discuss the case with unit staff
- *Complete documentation and orders: 15-30 minutes*

New patient evaluation process

1. Write the First Draft of the Evaluation Based on Chart Review
 - a. Obtain records to review—these include ER records from the current admission, older records from previous admissions if relevant, and any notes that have already been written for the current admission by nursing, social work, or other staff.
 - b. Either print out or electronically open your evaluation template.
 - c. Based on the records, fill in the relevant sections of the evaluation template.
 - d. Before you interview the patient, print out your draft (or simply bring your paper template) so you can jot down notes during the interview. Another option is to bring your laptop with you and input your patient’s answers during the interview (though some patients may find this off-putting since it’s hard to maintain much eye contact).
 - e. Where to find templates: Your EHR may already contain templates that are adequate. We also provide two kinds of templates that you can use in this fact book
 - i. Short: This is a one-pager with the main categories of information that you will need to ask about. The advantage is that you get quick reminders on one sheet; the disadvantage is that you don’t have much space to take notes
 - ii. Long: This is a several page template with space for notes. The disadvantage is that you have to flip through pages to find the right section as you are talking to your patient.
2. Interview the patient and fill in gaps in the evaluation template
3. Contact informants (family members, friends) to gather additional information.
4. Complete the evaluation and proofread briefly before saving to your EHR.