**Phase 1:**

1. Has your practice developed a vision and plan for transformation?

[ ] No vision or plan developed

[ ] Beginning to develop vision and plan

[ ] Vision and plan developed, but have not detailed how goals will be addressed

[ ] Vision and plan full developed

What is your Vision statement?

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Create Date:

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**Phase 2:**

1. Has your practice met its targets and has it sustained improvements in practice-identified metrics for at least one year?

[ ] Identified metrics, collected baseline information and identified IT capabilities

[ ] Monitoring metrics, not showing improvement yet

[ ] Shown improvements, not reached target

[ ]  Met at least 75% of its target sustained improvement for at least 1 year

What metric does your practice want to want and improve upon over the next year?

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What is target improvement after the year?

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What is the base line date and when is the starting point?

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What interventions is your practice implementing to meet the above goal?

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1. Can your practice demonstrate that it encourages patients and families to collaborate in goal settings, decision making, and self-management?

[ ]  No

[ ]  Training staff in shared decision making

[ ]  Developing approaches to encourage shared decision making

[ ]  Demonstrate shared decision making

How does your practice incorporate shared decisions making?

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1. Does your practice use a consistent approach to assign patients to provider?

[ ]  No

[ ]  Reviewing but not actively utilizing lists

[ ]  Actively utilizing lists but not on a regular basis

[ ]  Actively utilizing and updating lists on a regular basis

Do you actively review the panel to in a systematic way to allow patients to see their own PCP?

What is that process?

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1. Does your practice have a method to IDENTIFY high risk patients and CREATE a care plan appropriate to the level of risk?

[ ]  No process in place

[ ]  Identifying and stratifying according to risk levels

[ ]  Identified and stratified patients according to risk levels and is in process to

 implement appropriate care plan

[ ]  Implemented a process to provide appropriate care plan

What is the process in which your practice identifies and works proactively with high risk patients?

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1. Does your practice have a method to IDENTIFY and DOCUMENT a care plan provided for high risk patients?

[ ]  Not identified, not documenting

[ ]  Identifying, not documenting

[ ]  Piloting a process to identify and document

[ ]  Consistently providing and documenting a care plan

How does your practice provide care plans to your high risk patients?

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1. Does your practice link patients with appropriate community resources to facilitate referrals?

[ ]  Not referring patients

[ ]  Compiling inventory of resources, and established communication

[ ]  Referring patients but not following up on referrals

[ ]  Referring patients and following up on referrals

 What is the referral process for your practice?

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How are you identifying referrals you did not receive notes back on?

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Is there a certain specialty in your community that is more difficult to coordinate care with?

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1. Do you follow up with patients after an emergency room visit or discharge from hospital?

[ ]  Establishing a method of receiving communication from the hospital

[ ]  No process in place to follow-up with the patient

[ ]  Establishing a plan to regularly follow-up but not yet consistent

[ ]  Established a plan and consistently following-up

How do you know of your patients going to the emergency Room?

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What is the time lag of getting this notification?

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What is your process of follow up with the patients once you identify they have been in the emergency room?

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1. Do you ensure that care of your patients addresses the whole person in both mental and physical health?

[ ]  Not yet

[ ]  Identify patients, but access is not always ensured

[ ]  Identify patients and provide access, but information between facilities is not consistently shared nor coordinated

[ ]  Identify patients and provide access consistently and a formal agreement is in place for full integration of care

What is the process in your practice for connecting patients to mental and physical health?

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1. Does your practice use formal quality improvement techniques?

[ ]  No standard improvement methodology identified or used

[ ]  Improvement methodology identified but not yet in use

[ ]  Beginning to incorporate improvement methodology in some areas

[ ]  Improvement methodology fully implemented in the practice

Describe the quality improvement techniques your practice uses.

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1. Does your practice incorporate quality improvement into the practice and empower staff to innovate and improve?

[ ]  Need identified but not implemented

[ ]  Some staff involved in quality improvement initiatives

[ ]  Quality improvement training built in to regular staff training and onboarding

[ ]  Quality improvement capability developed and encouraged with allocated time given to staff

How does your office incorporate and empower staff in practice innovation and improvements?

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1. Does the practice utilize performance reports for organization and care team?

[ ]  No reports are being produced or utilized

[ ]  Some reports are produced, not fully shared

[ ]  Reports regularly produced, goals met, but limited sharing

[ ]  Reports produced, goals met, info shared, effective system for follow up

How does your practice use performance data within the hierarchy to meet goals?

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Please provide example of reports being used in the care team to foster transformation.

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1. Does your practice have strategies in place to cultivate joy in work and have documented results?

[ ]  No

[ ]  Developed Strategies

[ ]  Has strategies but not measured

[ ]  Has strategies and can show results thru metrics

How do you assess staff satisfaction?

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What strategies do you have in place for creating joy in the workplace?

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How do you assess staff satisfaction?

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