SHARP Community Medical Group

Practice Observation Template

Practice Name:_____ **Date:** _____

Physical Location	**Comments:**
☐ Y ☐ N Adequate parking available ☐ Y ☐ N Adequate, visible signs ☐ Y ☐ N Handicap accessible ☐ Y ☐ N Unpleasant smell ☐ Y ☐ N Clean Surroundings ☐ Y ☐ N Positive community atmosphere 1. Describe your first impression	
Waiting Room	**Comments:**
☐ Y ☐ N Adequate seating ☐ Y ☐ N Masks available ☐ Y ☐ N Tissues available ☐ Y ☐ N Hand sanitizer available ☐ Y ☐ N Tidy appearance ☐ Y ☐ N Current magazines ☐ Y ☐ N Current signs/notices ☐ Y ☐ N Educational Handouts ☐ Y ☐ N Television ☐ Y ☐ N Educational Monitor ☐ Y ☐ N Water available ☐ Y ☐ N Coffee/snacks served 1. Describe your first impression 2. Describe cleaning process for toys and furniture	
Receptionist Work Area	**Comments:**
Ratio of receptionist to providers:____:____ ☐ Y ☐ N Adequate privacy ☐ Y ☐ N Tidy appearance ☐ Y ☐ N Ample Work Space 1. Acquire copies of new patient and/or chronic disease paperwork	

Defects – Transportation – Searching – Inventory – Movement – Excessive Processing – Waiting – Confusion

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Scheduling	Comments:
☐ Y ☐ N Written scheduling policy ☐ Y ☐ N Patients assigned to PCP/Care Team ☐ Y ☐ N Using PM templates 1. List average # if appointments per provider 2. Describe who can book appointments and how they are trained 3. Describe pre-visit information obtained by staff when booking appointments 4. How many patients enrolled to each provider?	
Access	**Comments:**
☐ Y ☐ N Offer Same Day Appointments List blocked SDA times:_____ ☐ Y ☐ N Offer early/late appointments Days/Hours:_____ After-hours calls managed by: ☐PCP ☐RN Triage ☐Shared On-Call 1. Describe same day visit access 2. Describe after-hours access	
Pre-Planning – Receptionist	**Comments:**
☐ Y ☐ N Eligibility Check _____days ☐ Y ☐ N Pre-Visit Planning ____days ☐ QIS ☐HIPAA ☐Advance Directive ☐ Other_____ ☐ Y ☐ N Patient reminder system ____ days ☐ Automated ☐ Live person ☐ Y ☐ N Identified access manager/monitor?	

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Check-In/Out	Comments:
☐ Y ☐ N Staff acknowledge patients upon entry (eye contact, smile, greeting) ☐ Y ☐ N Staff introduce themselves (and roles) to patients ☐ Y ☐ N Staff show concern (sincere, personal) for patient/family ☐ Y ☐ N Keeping patient informed (what, how, duration) ☐ Y ☐ N Share appreciation for choosing practice ☐ Y ☐ N Agenda Setting Form Used ☐ Y ☐ N New Patient Packet Available ☐ Y ☐ N New Patient Packet Mailed ☐ Y ☐ N No show/cancellation policy established. No Show Fee _____ ☐ Y ☐ N Process to follow up on patient no-shows ☐ Y ☐ N Using PM Templates 1. Describe check-in and out process. 2. Can staff verbalize no show rates? If so, what is the rate?_____ 3. How are walk-ins/no-show/cancellation appointments handled? 4. Describe process to keep providers on schedule	
Call Processing – Receptionist	**Comments:**
☐ Y ☐ N Appointment related calls ☐ Y ☐ N Medical concerns calls ☐ Y ☐ N Referral Status calls ☐ Y ☐ N Using EHR templates 1. Describe call processing workflow (expected times for returning calls, handoff from receptionist to MA staff) 2. Top 3 reasons of patient calls. _____ _____ _____	
Hallways	**Comments:**
☐ Y ☐ N Free and clear ☐ Y ☐ N Handicap friendly ☐ Y ☐ N Peds scales available ☐ Y ☐ N Privacy at scale	

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MA Work Area	Comments:
1. Ratio of MAs to providers:___:___ ☐ Y ☐ N Adequate privacy ☐ Y ☐ N Tidy appearance ☐ Y ☐ N Ample Work Space 2. Describe flagging system/handoffs from MAs to provider 3. Acquire copies of staff protocols	
Exam Rooms	**Comments:**
☐ Y ☐ N Tidy appearance ☐ Y ☐ N Fair wear & tear of furniture ☐ Y ☐ N Walls clean and in good repair ☐ Y ☐ N Window treatments well maintained ☐ Y ☐ N Equipment/supplies standardized in each room ☐ Y ☐ N Computer in room ☐ Y ☐ N Printer in room ☐ Y ☐ N Poisons locked ☐ Y ☐ N Needles/meds locked ☐ Y ☐ N Adequate seating ☐ Y ☐ N Needle boxes safe ☐ Y ☐ N Supplies -- not expired ☐ Y ☐ N Staff has all needed supplies/equipment in rooms (do not need to leave room to gather them) 1. Describe process to clean rooms 2. Describe patient education materials	
Technology	**Comments:**
☐ Y ☐ N Enough terminals ☐ Y ☐ N Using EHR templates ☐ Y ☐ N Computer screen privacy 1. Describe terminal locations 2. Describe reporting capability and use of reports 3. If paper records, describe flow of chart during visit	

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Patient Flow – MA	Comments:
☐ Y ☐ N Staff introduce themselves and roles to patients ☐ Y ☐ N Staff show concern (sincere, personal) for patient/family ☐ Y ☐ N Keeping patient informed (what, how, duration) ☐ Y ☐ N Share appreciation for choosing practice 1. Describe process to keep providers on schedule 2. Describe team-based care	
Screening/Rooming Process	**Comments:**
☐ Y ☐ N Vital Signs at every visit ☐ Y ☐ N Proper BP technique BP taken Manually Automatically ☐ Y ☐ N PHQ-2 Screening ☐ Y ☐ N Tobacco Screening ☐ Y ☐ N QIS Reconciliation with every patients ☐ Y ☐ N Medication Reconciliation in EHR ☐ Y ☐ N Using EHR templates 1. List wastes in rooming process	
Medications/Vaccines	**Comments:**
1. Where are meds/vaccines prepared? ☐ Y ☐ N Prep area clean ☐ Y ☐ N Minimal distraction ☐ Y ☐ N All medications locked 2. Where are prescription pads stored/located? ☐ Y ☐ N Is there a medication sample policy in place? 3. Who monitors medication expiration dates? 4. Describe how/where immunizations are stored ☐ Y ☐ N Medication refrigerator ONLY has meds in it 5. Describe how refrigerator temp is monitored?	

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Prescription Refills	Comments:
1. Describe refill process by phone/during visit ☐ Y ☐ N Patients call pharmacy for refill requests ☐ Y ☐ N Clinician approves refill requests ☐ Y ☐ N Using EHR templates 2. Describe Controlled Substances refill process by phone/during visit ☐ Y ☐ N Pain Contract updated yearly ☐ Y ☐ N Monthly FU Visits	
Call Processing - MA	**Comments:**
1. How are patients notified about abnormal lab/radiology results? ☐ Y ☐ N Call 2. How are patients notified about normal lab/radiology results? ☐ Y ☐ N Call ☐ Y ☐ N Patient Portal ☐ Y ☐ N Letter 3. How are same day visit requests processed? ☐ Y ☐ N MA can schedule 4. Describe call processing workflow (expected times for returning calls, handoff from receptionist to MA staff) 5. Record the top 3 reasons of patient calls. _____ _____ _____	
Referral Tracking	**Comments:**
☐ Y ☐ N Referrals tracked (appointment kept/notes received) ☐ Y ☐ N Using EHR Templates 1. Describe clinician to staff handoff ☐ Order Entry ☐ Via Task 2. Who processes the referrals? ☐ Referral Coordinator ☐ MA ☐ Receptionist 3. How are patients notified? ☐ Call ☐ Letter ☐ FMH ☐ None 4. Describe referral process for SCMG and other insurance providers	

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Transitions of Care ☐ Y ☐ N Pre-screening records 1. Describe the process for urgent care and ED visit follow ups 2. Describe the process for in-patient hospital follow ups	**Comments:**
Population Management ☐ Y ☐ N Using P4P Report ☐ Y ☐ N Using DM Outcome Report ☐ Y ☐ N Using HM Report 1. How do you define an active patient? 2. Which, if any, EBGs/standing protocols are in use? 3. Who maintains the registry? ☐ Dedicated Care Coordinator ☐ MA ☐ Divided among staff 4. Documentation process ☐ Task ☐ FYI ☐ Chart Alert	**Comments:**
Self-Management Support/Education ☐ Y ☐ N Material in other languages? _____ ☐ Y ☐ N Age specific (large print for elderly, peds versions) ☐ Y ☐ N Literacy assessment being conducted 1. Describe location of education material 2. Which materials/topic are used most 3. Who does individual goal setting with patients? 4. Who follows up on goals set by patients? 5. Describe patient education methods (In-person vs. handouts or both?)	**Comments:**
Communication ☐ Y ☐ N Huddles ☐ Y ☐ N Patient Advisory Council ☐ Y ☐ N Interpreters available (include hearing/visually impaired as well as other languages)	**Comments:**
Sensing Questions **Solicit feedback from the Staff/Leadership regarding:** 1. What gets in the way of you doing your job? 2. What frustrates you about what it takes to get things done around here? 3. Where do you notice we waste time, money,	**Comments:**

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resources? 4. What questions or concerns do you have? 5. Anything we should know in order to have a successful improvement?	

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