

# Practice Support Program

## In-Depth Practice Self-Assessment Questionnaire

The heart of professionalism is self-regulation. This means the regulation of everything in our practices, from behaviour to ethics, scientific competency, and even practice organization.

Why should we regulate ourselves?

Because most people – including doctors themselves – believe that doctors have a privileged and special role that obligates us to fulfill a time-honoured tradition of serving the ill and injured. To fulfill this role, it's a good idea to occasionally take stock of how well we're doing. Due to the stresses of the medical profession, we also owe it to ourselves and our families to review our individual approaches to the practice of medicine.

The Practice Support Program's Practice Self-Assessment is a self-evaluation or self-audit process in keeping with this spirit. Going through a process of reflection on our practices and our medical lives may help us find ways to both improve patient care and better satisfy our own professional needs. The practical outcome of this process might lead you to make some change or improvement, with help from this program.

Every family physician is encouraged to complete this self-assessment. Take some time. You may find it beneficial to sit down with your medical office assistant (MOA) to determine what answers you can find from your billing software. Also, we encourage you to discuss the topics in this questionnaire with other members of your practice – peers and staff – to see how their perspectives and experiences in the practice may vary from your own.

Ideally, you should review the short practice self-assessment questionnaire before proceeding with this longer version.

In either case, we hope and expect that this will be useful to you.

Good luck!

# 1. Practice Profile

## Who Are Your Patients?\*

Patient demographics	No.	%
0-10 years		
11-18 years		
19-45 years		
46-64 years		
65-79 years		
>80 years		
Males		
Females		
Patients with English as a second language		
<b>Total patients in practice</b>		

Patients seen/not seen	Est. no.	%
Patients seen in an average day		
Patients not seen within the last year <sup>†</sup>		
Patients with chronic conditions not seen in the last 6 months (e.g., diabetes)		

## Chronic Conditions

Patients with chronic conditions	No.	Est. no. of patients referred to specialist in last year <sup>◇</sup>	Est. no. of patients hospitalized in last year (if known)
Diabetes			
Congestive heart failure (CHF)			
Hypertension			
Chronic kidney disease (CKD)			
Chronic obstructive pulmonary disease (COPD)			
Depression			
Other			
<b>Total (unique) patients with chronic conditions</b>			
<b>Total patients with multiple chronic conditions</b>			

\* If you cannot easily obtain this information from your billing or electronic medical records (EMR) software, the BCMA Practice Profiles are a good source of patient demographic profiles for your practice.

† Ask your MOA to check whether your billing software can identify the total number of patients in your practice compared with those who have had visits within the past year.

◇ Ask your MOA to look at “no charge referrals” in your billing software to determine the number of referrals made.

## 2. Practice Management

### Appointments/Scheduling

**How many different types of appointment time blocks are there in your schedule?**

1-2

3-4

5-6

7+

**In the last month, what was the estimated average wait between booking and appointment (hours/days/weeks)?**

Urgent appointments

Non-urgent appointments

**In last month, what was the average wait time for most patients, between arrival (appointment time) and the time they actually saw you?**

On time (no wait)

<10 min

<30 min

<1 hour

>1 hour

**How much time do you spend with patients in your office each day?**

<2 hours

2-4 hours

4-6 hours

6-7 hours

>7 hours

**How much time do you spend on paperwork and other administrative activities each day?**

<1 hours

1-2 hours

2-3 hours

3-4 hours

>4 hours

**On average, how much time do you spend outside the office each day on hospital rounds or surgery?**

<1 hours

1-2 hours

2-3 hours

3-4 hours

>4 hours

**On average, how much time do you spend outside the office each day on home visits or visits in a care facility?**

<1 hours

1-2 hours

2-3 hours

3-4 hours

>4 hours

**On average, how many days per month do you book patient appointments?**

1-5

6-10

11-15 hours

16-20 hours

>20

**Appointments in the last month Avg.**

**no.**

**%**

**Average duration**

Total

100

Non-urgent

Acute illness-related

<b>Appointments in the last month Avg.</b>	<b>no.</b>	<b>%</b>	<b>Average duration</b>
Chronic condition-related			
Booked by patient			
Booked by staff recall			

<b>Question</b>	<b>Yes</b>	<b>No</b>	<b>S/M*</b>
<b>General</b>			
Do you accept new patients?			
Do your patients report high satisfaction with the medical services provided by your practice?			
Do your patients express frustration or low satisfaction with medical services provided by your practice?			
Do your patients report high satisfaction with administration services provided by your practice?			
Do your patients express frustration or low satisfaction with administration services provided by your practice?			
Do you periodically administer patient surveys and make changes based on the results?			
Have you attempted to analyze the clinical needs of your practice to ensure that you offer the services and schedule that best suit your patients' needs?			
Do you generally start and end the day on schedule?			
Are your practice facilities safe and handicap-accessible for patients? Are your practice facilities well laid out, efficient, and ergonomic, and is there adequate space?			
Do your practice facilities have adequate privacy and security (for example, MOA computer screen not visible in the waiting room; charts not accessible to the public)?			
Are your exam rooms well stocked and arranged to maximize efficiency?			
<b>Billings</b>			
Does your practice have an efficient, secure, computerized system for billing and accounting?			
Are almost all of your claims error-free (>98%)?			
Do you believe you are generally billing for all services you're entitled to bill for?			
Do you make full use of billing codes?			
Do you perform services that you can't or don't bill for?			
What is your operating cost per visit (total monthly overhead divided by number of monthly visits)?			

\* S / M = Some, Sometimes, or Maybe

Question	Yes	No	S/M*
Do you do regular reviews of your billings and accounts receivable and assess the practice's overall financial status?			
<b>Appointments</b>			
Do patients who call your practice generally get through promptly, are they treated courteously, and do they receive correct information?			
Can your patients usually get a same-day appointment when they want it, even for routine matters?			
Do you use email to contact patients?			
Do patients usually see you, rather than a locum or another partner, at their appointments?			
<b>Planned recall</b>			
Do you currently have and use a recall system?			
Do you have a system in place to follow up on missed appointments?			
Are patient no-shows a problem?			
<b>Staff roles and satisfaction</b>			
Is your MOA responsible for mostly administrative duties?			
Does your MOA provide any patient care or education?			
If not, do you want to expand your MOA's role to provide more patient care or education?			
Are your staff generally well trained, well organized, experienced, efficient, and productive?			
Do you use any productivity incentives or measures to motivate staff?			
Do you regularly measure staff satisfaction, and address problems promptly?			
Do staff receive regular performance evaluations?			
Are staff pay raises clearly tied to performance measures?			
Do new staff members receive pre-planned orientation and training?			
Do you have regular staff meetings?			
If you have regular staff meetings, are they well attended, positive, and useful for everyone?			
Does your practice regularly review and discuss safety and reliability issues?			
<b>Continuity of care</b>			
Do you have an on-call system that meets your patients' needs?			
Do you make house calls?			
Can you get or do you have appropriate locum support for holidays and other days out of the office?			
Do you do hospital visits?			
Do your patients have reasonable telephone access to your office during the day?			

### 3. Clinical Management

Question	Yes	No	S/M*
<b>General</b>			
Are you familiar with the most recent clinical guidelines for diabetes, CHF, and hypertension?			
Do you generally follow the clinical guidelines to ensure that your patients receive care that is appropriate?			
Do you find the guidelines generally helpful?			
Do you have any clinical support (e.g., a practice nurse) to assist in chronic disease management (CDM)?			
Do you track your performance in providing clinical guideline-based care for at least one condition? (For example, do you know the proportion of your diabetes patients who have had at least two A1c tests within the past year?)			
Do you bill the Medical Services Plan (MSP) for the CDM fees available for diabetes, CHF, and hypertension?			
Have you introduced patient self-management strategies into your practice?			
Do you think you might benefit from being a member of a CDM collaborative, or by taking advantage of the Practice Support Program's CDM change management strategies?			
Are your patient medical records complete, including descriptions of conditions, treatments, test results, and medications?			
Can your patient medical records be easily read and understood by colleagues?			
Do you practice active listening with patients, and regularly check to ensure that they understand the information provided to them?			
Can you obtain current, authoritative answers to most clinical questions in 15 minutes or less through resources in your office or on the Internet?			
Do you often feel rushed when seeing patients?			
Does your practice have an effective shared care relationship with <i>specialists</i> to improve the health and care of your patients?			
Does your practice have an effective working relationship with <i>community programs and services</i> (e.g., physiotherapy, recreation centres, seniors' programs) to improve the health and care of your patients?			
Does your practice have an effective working relationship with <i>acute facilities and other health authority services</i> (e.g., home and community care) to improve the health and care of your patients?			
Do you have a system in place to promptly notify patients regarding <i>normal</i> diagnostic test results?			
Do you have an effective system in place to promptly follow up with patients regarding <i>abnormal</i> diagnostic test results?			

\* S / M = Some, Sometimes, or Maybe

Question	Yes	No	S/M*
<b>Patient registries</b>			
Do you maintain a patient registry for at least one chronic condition (paper, EMR, or CDM Toolkit)?			
Do all or most patients with diabetes have flowsheets?			
Do all or most patients with CHF have flowsheets?			
Do all or most patients with CKD have flowsheets?			
Do all or most patients with COPD have flowsheets?			
Do all or most patients with hypertension have flowsheets?			
Are all or most patients with depression scored using a validated assessment tool (such as a PHQ-9 or GAD-7)?			
<b>Patient self-management</b>			
Do you help and encourage patients with chronic conditions to self-manage their conditions?			
Do you have patient handouts easily available to give to patients when appropriate?			
Do you give patients copies of their flowsheets?			
Do you refer patients to education courses, or suggest specific print and online resources?			
<b>Group visits</b>			
Have you ever organized a group visit to deliver care to multiple patients at once?			
If you have held group visits, do you feel that they were largely successful?			
Do you plan to hold group visits regularly?			
If you have not held group visits, do you plan to start in the near future?			
Do you have access to a reliable team of health professionals to facilitate and participate in group visits?			
<b>Diabetes</b>			
For the diabetes patients in your registry (or known to you), can you easily determine when they were last seen?			
Do you know the mean A1c or lipid level value of your patients (last test for each patient)?			
Can you easily determine the testing rates for A1c, blood pressure, and lipids in your patients?			

Question	Yes	No	S/M*
<b>Congestive heart failure (CHF)</b>			
Do you have access to ejection fraction tests to diagnose CHF?			
If so, do you routinely use ejection fraction tests to diagnose CHF?			
Do you have access to BNP tests to assist in diagnosis?			
If so, do you routinely use BNP tests to assist in diagnosis?			
Do you know the percentage of your patients on ARB and/or ACE inhibitors?			
Do you know the percentage of your patients on beta-blockers?			
<b>Hypertension</b>			
Do you know the percentage of your patients with severe hypertension?			
Are you regularly ordering eGFR tests for your hypertensive patients?			
<b>Chronic kidney disease (CKD)</b>			
Are you familiar with the classifications (five stages) of CKD?			
Do you know the percentage of your patients with eGFR < 60?			
<b>Chronic obstructive pulmonary disease (COPD)</b>			
Are you familiar with the new COPD clinical guideline?			
Do you routinely order spirometry in high-risk patients, such as smokers?			
<b>Depression</b>			
Do you often use screening tests to diagnose depression, such as the PHQ-9?			
Do you personally feel comfortable treating people with mental illness?			
For those whom you cannot comfortably treat, do you have a planned approach and access to an appropriate referral?			
Are you reasonably up-to-date with the use of antidepressant medication?			

## 4. Information Technology (IT)

Question	Yes	No	S/M*
<b>Non-EMR users</b>			
Does a paper-based practice work effectively for you and your patients?			
Can you usually retrieve information quickly enough from paper records?			
Do you foresee any major challenges in continuing with a paper-based practice?			
Do you use the Internet at home?			
Do you use the Internet in your practice?			
Do you use email at home?			
Do you use email at your office?			
Are you planning to move to an EMR system within the next year?			
<b>If not, skip to "CDM Toolkit"</b>			
Have you decided which application will best fit your practice?			
Have you assessed the impact of automation on job roles and workflow for you and your office staff?			
Do you have a plan to obtain IT training for staff and physicians (e.g., basic computer skills)?			
Will you need to make physical renovations to your office to accommodate IT?			
Do you foresee any major challenges in moving to an IT/EMR environment?			
What are the challenges in moving to an IT/EMR environment? Please describe.			
<b>Current EMR users</b>			
Do you have more than one computer in your office?			
Does your EMR system work well for you?			
Do you prefer using an EMR system instead of paper files?			
Do you use a personal digital assistant (PDA) or other handheld device in your practice (e.g., to collect or store medical or patient information)?			
If so, does your PDA work well for you?			

\* S / M = Some, Sometimes, or Maybe

Question	Yes	No	S/M*
Does your PDA provide you with sufficient point-of-care support?			
Is there other software available that would increase your practice's efficiency?			
Does your practice have an Internet website for patients and the public?			
Does your practice have an internal website for staff communications and resources?			
Do you use a computer during patient visits?			
Do you have Internet access at home?			
Do you have Internet access in your practice?			
Do you use email at home?			
Do you use email at your office?			
Do you or your staff have enough IT knowledge and training?			
Do you feel that you get maximum use out of your computers and current software?			
Do you believe that computers make your practice management more efficient and effective (e.g., scheduling, billing)?			
Does using computers make your clinical work more efficient and effective (e.g., prescriptions, referrals, problem list management)?			
Do you use your EMR system for planned care and other decision support for patients (e.g., recalls for flu shots, Pap tests, follow-up for patients with chronic conditions)?			
Do you feel that all the members of your practice (physicians, MOAs, and any other individuals) are strongly committed to using IT?			
Do you have sufficient IT management systems in place (e.g., backups, disaster recovery, software updates)?			
Is there a specific person assigned to be responsible for IT procurement and system management (e.g., maintenance, checking backups, upgrades)?			
Do you have an assigned budget for ongoing system maintenance and enhancements?			
<b>CDM Toolkit</b>			
Do you use the provincial CDM Toolkit for any chronic condition?			
<b><i>If not, skip to "Overall Assessment."</i></b>			
Do you find the CDM Toolkit relatively easy to use?			
Do you find the CDM Toolkit to be an effective aid for managing patient registries and planned recall in your practice?			
Do you upload data from an EMR system into the Toolkit?			
Do you manually enter flowsheet data into the CDM Toolkit?			
Does your MOA enter flowsheet data into the CDM Toolkit?			
Do you update printed flowsheets manually during patient visits?			
Do you periodically generate and use reports from the CDM Toolkit, such as Recall Reports?			

# Overall Assessment

General Comments	
What insights into your practice did you gain from this assessment?	
Do you see an immediate and obvious change that you can easily make? Describe.	
Do you see some longer-term changes that you'd like to make over the next year or two? Describe.	
What are you most proud of about your practice?	
What part of your practice needs the most immediate attention?	
What have you changed successfully in your practice in the last six months?	
What did you try to change unsuccessfully in the last six months?	

## Funding and Support

There is compensation available through the Practice Support Program for taking the time to complete this assessment. Contact your regional Practice Support Team for more information. Your Team can also provide information on other tools, resources, and funding available. Some of your physician peers are members of the Teams who have made changes in their own practices, and they can provide you with support and advice if you are interested.

For a list of Practice Support contacts, please visit the Practice Support Program website at [www.practicesupport.bc.ca](http://www.practicesupport.bc.ca)