**Simplified practice assessment**

*Use this simple practice assessment checklist to gauge the overall health of your practice through these five key areas.*

**Team-based care**

We are actively working to support physician-led, team-based care (check all that apply):

* We have a team-based culture, and everyone feels that they are contributing in a meaningful way to quality patient care
* We have regular team meetings to discuss roles, responsibilities, hand-offs and difficult situations
* We start each clinic day with a brief team huddle
* We have established standing orders and protocols so team members can participate in patient care without authorization for every move or decision (in accordance with our state laws)
* We provide ongoing training for staff
* Our EHR is set up to engage and utilize the entire team

**Clinical quality and performance measurement**

We are constantly evaluating our clinical quality and performance (check all that apply):

* We routinely monitor and analyze a core set of clinical performance measures to inform our quality improvement priorities
* We use point of care registries to monitor and improve our management of patients with chronic conditions
* Our team receives regular feedback about performance on clinical measures and discusses opportunities for improvement
* We are able to compare our clinical performance to other practices with similar demographics to see how we “measure up”

**Health information technology (HIT)**

In our clinic, we optimize the use of HIT (check all that apply):

* We are continuously examining our workflows and EHR functionality to improve the efficiency and reliability of our patient care
* We have an interactive patient portal that allows patients to request appointments and prescription refills and view laboratory results
* We have a system to support secure virtual communication with patients (in accordance with applicable law)
* We are using text messaging, video visits and/or e-visits to enhance relationships, provide support between visits and ensure better service for patients (in accordance with applicable law)

**Professional satisfaction**

In our practice, we are very aware of the risk of physician and staff burnout and seek to improve the work environment (check all that apply):

* We administer regular physician, staff and patient satisfaction surveys
* We have a group in our practice that is committed to improving the wellness of our physicians and staff
* We cover a brief item about improving workflows and a positive work environment at every team meeting
* We use an employee assistance program (EAP) or other resources when we identify physicians or staff in need of help managing stress, depression or burnout
* We have regular activities that help connect our team on a more complete level than just common daily work

**Practice organization and finance**

We are actively managing important financial and personnel activities (check all that apply):

* Our clinic leadership and governance model supports quality improvement efforts and rapid decision-making
* We perform regular coding audits and training to optimize billing
* We actively manage accounts receivable and bill within a few days of service
* We perform monthly budget reviews to aid forecasting and inform management decisions
* We are getting detailed practice-specific data to help manage local providers and staff (if part of a larger organization with central financial and accounting services)

*Source: AMA. Practice transformation series: preparing your practice for change. 2015.*