The *Family Practice Management* Practice Self-Test

Here's an easy way to gauge how well your practice is doing in everything from quality of care to quality of claims.

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This test is designed to give you an easy way to evaluate the strengths and weaknesses of your practice. We hope it will help you decide where to concentrate your energy on making improvements and changes in the way your practice functions.

Why take the self-test?

When you complete the self-test, you will be able to score your practice on several different scales that ought to give you food for thought. And we'll point you in the direction of information that can help you make improvements.

If you take the additional step of sharing your results with us at *Family Practice Management,* we can give you further insight by showing you how your scores compare with those of other readers who have reported results. We will also use the results to help target *FPM* articles to the needs of our readers. (If you do share your results with us, we will keep them confidential; see below.)

The self-test was developed by the editors of *FPM* in consultation with members of the *FPM* Board of Editors and Panel of Consultants. Items were selected to cover the range of topics that *FPM* deals with – that is, everything but the purely clinical aspects of practice. The self-test makes no claims of scientific validity as a survey instrument, and its goal is not to develop a picture of the advancement of family practice as a specialty. Rather, the self-test is an informal way for you to get a clearer picture of the characteristics of your own practice – both things you would like to change and things you wouldn't change for the world. (See the related editorial on page 11.)

Is it hard to complete?

No, it's actually quite easy; you can answer all the questions in half an hour or so, and you won't need to do any chart review or other research in the process. All you need to do is answer the questions as thoughtfully and honestly as you can.

The easiest way to take the test is to visit the *FPM* Web site and enter your answers online. The interactive, online version of the test will calculate your scaled scores and generate a report for you on the spot. To take the test online, go to www.aafp.org/fpm/selftest.

Who is the self-test for?

We have designed the self-test with practicing family physicians in mind, but if you are not in a mainstream family practice, you may still find the test useful. The self-test is designed to

The authors are the editors of Family Practice Management.

FPM Tool inside

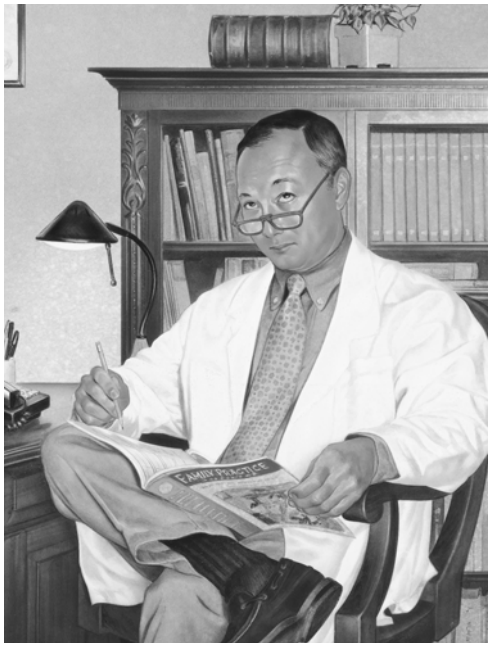

ILLUSTRATION BY MARK STUTZMAN

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work for solo physicians as well as for members of groups – even large groups – but it is definitely intended for physicians who spend at least some of their time in patient care.

Are the results confidential?

Since this is a self-scoring test, you can keep your results completely private. If you choose to share them with *FPM*, the *FPM* staff will not share results with anyone except in the form of aggregated data. Nor will we share your name, address or other contact information.

How do I take the test?

The self-test consists of 44 statements, with two simple questions about each:

A. How well does this statement describe *your own practice?*

B. How important is it for family practices to be able to do this?

On paper. In answering Question A, please circle the number that best indicates how closely the statement describes your practice. Similarly, in answering Question B, circle the number that best indicates how important you think the capability described by the sentence is. At the end of the self-test, you'll find instructions for calculating your scaled scores.

Online. The easy way to take the test is to use the interactive version available online through the *FPM* Web site. Just go to www.aafp.org/fpm/selftest and click your answers to the questions; your scores will calculate automatically.

Some of the statements in the list reflect qualities that are currently advanced as strengths by various authorities. While most of the statements are clearly related to some aspect of practice quality, family physicians may well disagree about others; where one sees a mark of quality, another may see a fad or an unnecessary complication. That's why we're asking you to indicate how important the capability implied by each statement is for optimal family practice. Your estimation of the importance of each item should be factored into your evaluation of your own scores.

Some of the statements link several things; give your practice a 4 on such a question only if all parts of the statement are true.

SAVE TIME. TAKE IT ONLINE!

To have your scaled scores calculated automatically, take the practice self-test online at the *FPM* Web site.

The *FPM* Practice Self-Test

IMPORTANT: When you answer, think about *your own practice.* That is, if you are in a group, think about *your* patients, the staff members *you* normally work with and the facilities *you* normally use; don't answer for the group as a whole.

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1. When I ask for a consultation, I always provide a specific, written request, make sure the patient understands the reason for the request and have a reminder system to make sure we follow up when consultants' reports are not returned promptly.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

---

2. My practice has systems to document and follow up on abnormal tests, missed appointments and patients who need periodic rechecks. We have made a measurable reduction in errors in these areas during the past two years.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

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3. I follow evidence-based guidelines to ensure that my patients receive age- and gender-appropriate preventive services, and my practice tracks performance in this regard.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

---

4. My staff and I systematically follow at least one evidence-based clinical guideline in my practice, and we track both our adherence to the guideline and the outcomes we achieve with it.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

5. Medical records for my current patients are complete, include centralized lists of problems, medications and allergies, and can be read and understood easily by colleagues.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

6. My practice maintains a patient registry for at least one chronic condition listing most or all active patients with the condition. We use the registry regularly to generate reminder notices and reports.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

7. We distribute and discuss customized patient handouts at all visits where they are appropriate. We offer patient education courses, and we direct patients to physician-reviewed print and online resources.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

8. We regularly solicit patient feedback using a patient satisfaction survey or standardized interviews, and we make changes based on the results.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

9. In dealing with my patients, I practice active listening and regularly ask them to show me that they understand what I have told them, for instance by restating my instructions.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

10. My practice has analyzed the demographics of our patient base and made a concerted effort to ensure that we offer the services and schedule that best suit our patients' needs.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

11. We have successfully implemented an open access plan that allows any patient to obtain a same-day appointment if desired, even for routine matters.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4** ➤

12. I keep a list of patients who are interested in using e-mail to communicate with me, and I use e-mail to communicate with them at least occasionally.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

13. On the basis of patient surveys, telephone company reports and test calls to the office, we have determined that patients who call my practice almost always get through promptly, are treated courteously and are given correct information.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

14. My exam rooms are stocked and arranged in a way that maximizes my efficiency.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

15. My staff is well-trained (and cross-trained), well-organized, experienced, efficient and productive.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

16. My practice's productivity incentive system takes into account a variety of productivity measures (e.g., relative value units [RVUs], number of visits, panel size, patient satisfaction, clinical outcomes, revenues), and it motivates both physicians and staff to work efficiently and provide excellent care.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

17. I almost always begin the day on schedule and end the day on schedule.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

18. My practice has an efficient, integrated, secure, computerized system for billing, accounting, appointment scheduling, medical records, patient education, e-mail and online research.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

19. I personally use a computer every day for work-related purposes.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

20. Our computer system regularly prompts me or members of my staff to remind patients of needed preventive care and follow-up visits.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4

21. I can obtain up-to-date, authoritative answers (evidence-based answers, where evidence exists) to almost all clinical questions in 15 minutes or less through resources in my office or on the Internet.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4

22. Almost all of my claims submitted to payers who are able to accept electronic claims are sent electronically and encrypted or otherwise kept secure.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4

23. My practice has a Web site that allows patients a secure means of electronic communication with me and/or members of my staff in addition to providing information about the practice.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4

24. I regularly use a hand-held computer to store and retrieve information of professional importance, such as medical databases, drug references and patient information.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4

25. Almost all of my claims are error-free, almost all billable services are billed, and regular self-audits help ensure appropriate documentation, coding, billing and compliance with the law.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4

26. My practice monitors accounts receivable closely, actively pursues receivables and attends promptly to problems. Receivables amount to less than 1.75 months of gross fee-for-service charges.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4

27. My practice evaluates managed care contracts before signing, monitors both the income from each contract and the costs we incur in fulfilling it and considers the results in deciding whether to renew.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4

➤

28. We monitor our overhead percentage closely, compare it with figures from an appropriate peer group of practices, and are working actively to reduce it.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

29. I know at least basic accounting principles; I understand how to read balance sheets and income statements, and I regularly review my practice's statements.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

30. My practice monitors its financial performance and is making an organized effort to improve performance – an effort that has the direct support of practice leadership.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

31. Our practice facilities are up-to-date, well laid out, safe, and handicap accessible; they meet regulatory requirements, have adequate privacy, ample space and adequate room for growth.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

32. Staff meetings are planned and held regularly, well attended, positive and useful; most attendees contribute to the discussion.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

33. Staff members receive performance feedback continually as well as during regularly scheduled performance appraisals, and raises are tied to clearly defined performance measures.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

34. New staff members receive pre-planned orientation and training, including a comprehensive orientation manual, training sessions with other staff members and outside courses as necessary.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

35. Staff and physician satisfaction is a high priority in my practice. It is measured regularly, and problems are addressed promptly and effectively.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

36. My practice takes a proactive, positive approach in working with third-party payers to improve payment systems and our working relationships.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4

37. My practice works directly with public health departments, pharmacies, hospitals, skilled nursing facilities and other community resources to improve the health of my patients and others in the community.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4

38. My own patients are almost always seen by me rather than a colleague.

A. How well does this statement describe your own practice?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family practices to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4

39. I have clearly defined personal goals and values, and they drive my everyday actions and decision making.

A. How well does this statement describe you?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family physicians to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4

40. I follow a healthy diet and exercise program; I maintain my weight within normal limits, and I neither smoke nor overuse alcohol.

A. How well does this statement describe you?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family physicians to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4

41. I am aware of the stress/anxiety in my life, and I am managing it effectively.

A. How well does this statement describe you?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family physicians to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4

42. I feel that I have achieved the balance of work life and home life that is right for me.

A. How well does this statement describe you?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family physicians to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4

43. I have a strong support network of family, friends and colleagues to turn to whenever I need it.

A. How well does this statement describe you?

Does not describe at all		Describes somewhat		Describes extremely well
0	1	2	3	4

B. How important is it for family physicians to be able to do this?

Not important at all		Somewhat important		Extremely important
0	1	2	3	4 ➤

44. I have adequate malpractice, disability, health and life insurance.

A. How well does this statement describe you?

Does not describe at all		Describes somewhat		Describes extremely well
0	**1**	**2**	**3**	**4**

B. How important is it for family physicians to be able to do this?

Not important at all		Somewhat important		Extremely important
0	**1**	**2**	**3**	**4**

Now what?

Once you have answered all the questions, you can calculate your scaled scores using the tear-out score sheet that follows this page, or you can enter your answers online at www.aafp.org/fpm/selftest to have them calculated automatically. To use the paper score sheet, remove the form at the perforations and follow the instructions for calculating your results. Then refer to the following section for a discussion of what the results mean.

Assessing your results

As you've seen from the scoring form, each of the items on the self-test pertains to one or more of nine scales (see box below).

When evaluating your scores for each scale, consider the following:

• The scaled scores can give you a *general* sense of where you stand, but it's the scores on individual items that you can do something about by making changes in your practice. For any scale you are concerned about, go back to look again at the items that make up the scale.

• As we said previously, not all of the statements in the self-test are universally accepted as positive characteristics; your estimation of the importance of each should be factored into your assessment.

• Where "Importance" scores (scores for Question B) are considerably higher than "Descriptive" scores (scores for Question A), you are saying that your practice falls short in ways you consider important.

• Whatever the importance score, a low descriptive score on any scale may be a cue to examine related aspects of your practice. It may mean little, or it may mean you need to get to work. For instance, if your practice is basically urgent care, you may not care about a low score on the "Continuity of care" scale, but if you have a more conventional family practice – or if you *want* your practice to be more like the conventional model – it's a different story.

• The scaled scores give you one sense of where you are. For a reality check, you need to see how your scores compare with those of other family physicians who have taken the test. To do that, see the next section.

FPM PRACTICE SELF-TEST: THE SCORING SCALES

Scale	Number of items	Notes
Continuity of care	6	
Experimental focus	11	Cutting-edge modifications of family practice in ways that hold promise but may not have been proved successful yet
Finances	8	Capabilities that indicate a financially stable, well-run organization
Physician wellness	7	
Quality	11	Capabilities that tend to produce high quality clinical care
Service	9	Capabilities that promote patient satisfaction
Staff and others	5	
Systems and Efficiency	20	Office systems designed to ensure that whatever should happen happens all the time; capabilities that ensure physician and staff energy produces the maximum of useful work
Technology	9	Mostly aspects of computer technology

How do your scores compare?

To find out, just share your self-test responses with *FPM* and provide the contact information necessary for us to get back in touch with you. There are two ways to do this:

• If you have Internet access, simply take the self-test online, answering all of the questions. The online version is available at www.aafp.org/fpm/selftest. This has the advantage of computing your scaled scores automatically. And once enough readers have taken the test, the pooled data will be available at the same Web address for comparison.

• If you don't have Internet access, fill in the tear-out score sheet that follows this page and fax or mail a copy to us. Our fax number is 913-906-6010, and our address is *Family Practice Management,* 11400 Tomahawk Creek Pkwy., Leawood, KS 66211. Once we have a significant number of responses compiled, we will send you a report of the pooled results against which you can compare your own scores. (But remember: We can't send you a report if you don't give us your name and address. **Please print clearly!**)

Improving your scores

If you don't like what you see when you evaluate your self-test results, you and your staff may have some work to do. Don't try to fix too much at once, though. Consider concentrating only on the scale that concerns you most – and even there, focus on one small area to begin with – an area you know you can have an impact on. The online version of this self-test includes links to some past *FPM* articles and other resources you may find helpful. Of course, *FPM* will continue to provide what help we can in future issues. Good luck! FPM