

# Practice Assessment to Incorporate Lifestyle Medicine

Assess the current state of the practice before formulating any change strategies. The following questions can guide that process as you think about changes to your practice.

1. How does the practice currently identify and document a patient's lifestyle behaviors? Which team member(s) are responsible for this?
2. What systems (e.g., prompts in the electronic health record [EHR], lifestyle medicine vital signs, flags or notes on charts, regular staff training, performance metrics for providers around adherence to guidelines, etc.) are in place to ensure lifestyle is assessed at patient visits?
3. How does the practice currently communicate lifestyle behaviors (e.g., signs or posters in waiting rooms and/or exam rooms, self-help materials available, badges or pins worn by staff, etc.)?
4. How does the practice currently help patients address lifestyle behaviors (e.g., distributing educational materials, referrals, group visits, individual counseling by providers or other staff, prescriptions, follow-up plans, etc.)?
5. Which team member(s) is/are responsible for advising patients on lifestyle and providing counseling and other resources?
6. What challenges does the practice face in identifying patients who need lifestyle education and helping them obtain it?
7. What has worked in helping patients improve or eliminate their chronic disease and improve their overall health? What has not worked?
8. What community resources are available for patients to access for help with improving their lifestyle behaviors? How can patients get connected to those resources?
9. What does success look like for patients in improving their chronic disease and overall health by making better lifestyle decisions? What does it look like for the practice and how will success be measured?

Evaluate the patient flow to identify areas where lifestyle-focused messages can be more visible. The following questions can guide your thinking as you evaluate your practice's patient flow.

1. What do patients see when they enter the practice? What do they see in exam rooms?
2. Who do patients see before meeting the clinician?
3. What questions are asked when vital signs are measured? Which vital signs are collected?
4. What information is exchanged with patients before the patient-clinician encounter?
5. How is lifestyle counseling and/or other treatment documented? Are there resources readily available in the EHR to make documentation easier?
6. How is lifestyle counseling and/or other treatment documented? Are there resources readily available in the EHR to make documentation easier?
7. What reminder systems and prompts are in place to alert clinicians of opportunities to discuss lifestyle change?
8. What path do patients take as they exit the office? Do they make any stops to speak with staff?
9. What contact does your staff have with patients after the visit? Are there printed or emailed visit summaries?

The guiding team or office champions can brainstorm ideas from the answers to these questions to identify where to transform the practice. An effective evaluation of these processes would ideally include all the providers and staff in the practice.

Engage all staff and stakeholders to fully understand the potential barriers and challenges specific to the various roles and responsibilities. Engaging all staff and stakeholders will help foster the teamwork necessary to make changes. Strategies based on observations and findings will help achieve the vision and goal you set for the new change.