



# 3 Practice Improvement Checklists



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# Practice Improvement Checklist

## Getting Started

The following foundational concepts are central to any high-functioning primary care practice.

### CHECKLIST

#### Staffing

- Develop physician leadership skills.
- Define staff member roles and job descriptions.
- Allow patients to select their personal physician(s).

#### Financial Management

- Budget and forecast for the future.
- Manage cash flows and seek revenue-enhancing opportunities.
- Optimize your practice's billing and coding procedures.

#### Health Information Technology

- Comply with the HIPAA security and privacy rules.
- Develop a contingency plan for down time and data loss.
- Establish policies and procedures for software maintenance.
- Give physicians 24/7 access to medical charts.

#### Quality Improvement (QI)

- Form a skilled team to work on QI projects.
- Learn about and use the basic principles of QI, then implement a QI project.

#### Patient Safety

- Learn about patient safety basics and assess your practice.
- Develop a culture of patient safety and address safety concerns.

#### Patient Experience of Care

- Assess patient population for culture, language, barriers, and needs.
- Conduct a patient satisfaction survey and act on the results.
- Provide appropriate care based on patient needs and background.

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## Building on Change

After you've laid the foundation for practice improvement, you're ready to tackle the core principles of a high-functioning primary care practice. Work at your own pace. Practice improvement takes time.

### CHECKLIST

#### Practice Culture

- Establish a practice transformation team and define your goals.
- Develop a project plan, lead practice change, and monitor progress.

#### Staffing: Team-Based Care

- Understand the basics of team-based care.
- Define team member roles and implement team-based care.
- Train and cross train staff.

#### Integrated and Coordinated Care

- Create a team to oversee care transitions.
- Coordinate and monitor care transitions across the medical neighborhood.
- Use performance measures to evaluate and improve care transition processes.
- Build relationships with community resources.

#### Population Health Management

- Learn about population health management.
- Select and use patient registries for population health management.
- Implement planned care for chronic and preventive services.

#### Patient Access to Care

- Give patients the ability to schedule same-day appointments.
- Add extended-hours access to routine and urgent care.

#### Patient Self-Management

- Prepare to implement patient self-management support.
- Assess the self-management skills of patients and caregivers.
- Use and develop patient care and action plans.
- Consider home monitoring for chronic conditions.
- Use motivational interviewing to coach patients.

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# Practice Improvement Checklist

## Sustaining Success

After implementing the practice basics and core principles, you're ready to take steps to further enhance patient care and practice efficiency. Should you complete the checklist, remember the practice improvement process is never finished. A high-functioning primary care practice strives to continually evaluate and improve practice performance and patient outcomes.

### CHECKLIST

#### Risk-Stratified Care Management

- Learn about and implement risk-stratified care management.

#### Health Information Technology

- Engage in your local health information exchange.

#### Patient Access to Care

- Communicate with patients through secure email.
- Establish an online portal and allow patients to access their medical information.

#### Patient-Self Management

- Engage patients in shared decision making.
- Offer health coaching to patients.

#### Patient Experience of Care

- Conduct periodic patient focus groups.
- Establish a patient advisory panel.

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