



Clinic name: _____

Individuals interviewed: _____

Assessors: _____

Assessment date: _____

Front Desk

How are appointments made?
What are the steps for each type?

- Phone in advance
- Phone for same day appointment
- Previous visit
- Walk in

Do you have different steps for each of the following types of visits?
If so, what are they?

- Long visits (physicals)
- Short visits (follow-ups)
- Nurse only visits (blood pressure, glucose level screenings)
- Walk in

Do you do reminders?

- Calls
- Letters/cards
- Does your system generate reminders?
- Do you send forms to the patient to complete before their visit?

What do you do to prepare for the next day's appointments (ask same-day appts. And walk-in patients)?

- Charts
- Insurance verification

Who pulls the chart for:

- Regular appointments:
- Same day appointments:
- Nurse visits:
- Phone calls:

What is the procedure to create new patient charts?

When the chart is pulled do you check for outstanding labs, missing consults, etc.?

What do you do if something is missing?

What do you do if you can't find a chart?

Patient Visit

What do you do about no-shows?

What do you do with the chart (policy vs. what really happens)?

What is your check-in process?

- Information verification (how)
- Papers the patient must sign
- Do you add forms to the chart before putting it up for the MA?

Do you have these forms available electronically?
If not, would you like to have these forms electronically?

How do you let the MA know the patient is ready to be seen?

Patient Visit: MA \ RN

MA begins visit (include where these items are done):

- Weight
- Vitals
- Review medications
- Other (e.g., foot exam, UA, strep screen, procedure set up)

What does the MA document?

How does the MA notify the MD the patient is ready and which is the next room?

- Chart in door
- Walkie-talkie
- Whiteboard
- Other:

Is there any communication between the MA and the MD other than that the patient is ready to be seen?

- Face-to-face
- Walkie-talkie
- Sticky note on the chart
- Whiteboard
- Other:

What type of information is communicated?

Are there variations between MAs, between MA & provider?

Patient Visit: MD Exam

MD completes exam

What does MD do if he needs something or needs the MA during visit?

- Lab
- Equipment
- Assistance with exam

Does the MA keep the MD on schedule? How?

What is the process when a patient has to leave the room for lab, x-ray, etc. and then comes back?

What does the MD document?

Does MA put anything else in the chart after the patient leaves?

Patient Visit: Labs

In house (describe the process):

Do you schedule procedures/tests for the patient?
If so, how?

- Phone
- Fax
- Provide patient with contact information
- Through an interface

Outside (describe the process):

- Hospital:
- Quest
- Labcorp
- Other:

How are lab results returned to the clinic, reviewed, and communicated to pt.?
What happens if patient can't be reached?
How do you know that labs were ordered, done, results returned, seen by MD, and given to patient?
Patient Visit: Referrals
Describe the ways patients obtain referrals (e.g., MA makes call, MD fills out form, etc.)?
How do you know the patient actually completes the referral?
Patient Visit Concludes
When is the visit documentation completed?
<input type="checkbox"/> As the visit concludes <input type="checkbox"/> Immediately after the visit in the nursing station <input type="checkbox"/> Between visits, when the MD has time <input type="checkbox"/> At the end of the day <input type="checkbox"/> Days/weeks later <input type="checkbox"/> Usually within _____hours/days
Is there variability between providers in the time it takes to complete the chart?
Do you give patient education information? Who gives it to the patient? How does the patient receive it?
<input type="checkbox"/> Printout <input type="checkbox"/> Verbally <input type="checkbox"/> Email
What happens to the chart?
<input type="checkbox"/> Goes with patient to check out <input type="checkbox"/> Goes to the doctors office <input type="checkbox"/> Sits in the work area for MD to work on as he has time <input type="checkbox"/> Other
Super-bill/Encounter form
Who documents on the super-bill? Where does it go at the end of the visit? How does it get there? What are the steps until a bill is dropped?
Coders
Do they have the information they need? How do they get their questions answered?

Patient Visit: Check-out Process

Who checks out the patient?

How are follow up appointments made?

How is payment handled?

- Co-pay
- Billing

Who completes the super bill/encounter form?

Where does it go after the visit?

Prescription Refills

Describe process when pt. calls in for a refill:

Describe process when pt. asks for a refill during an office visit:

What happens when the pharmacy calls about a refill?

Phone Calls (other than prescription refills)

What types of phone calls do you get most often:

Describe process for taking messages:

Describe process for returning patient phone calls: