# Optimizing Practice Efficiency Presentation Checklist

This checklist will help inspect some areas of your practice and identify opportunities for improved efficiency.

It is to be used in conjunction with the learnings from the 'Optimizing the efficiency of your practice' webinar. The recording can be found on the OMA Education Network.

Check your practice's processes and workflows periodically so it can improve and grow continuously.

Please go through the questions in the checklist and answer 'Yes' or 'No.' Once completed, check the items you replied 'No' to. Pick at most three items to tackle at a time, and prioritize according to your values, impact and effort needed to make the change.

Human Resources

Hiring and train with purpose	Y	N
Do you have clear and thorough job descriptions?	☐	☐
Is your pay scale in the top 25% for similar jobs?	☐	☐
Do you have an onboarding plan?	☐	☐

Minimize turnover by investing in your team	Y	N
Do you have a comprehensive training program for new hires?	☐	☐
Are your staff cross-trained to work with each physician in the practice?	☐	☐
Do the staff have the right tools to perform their work?	☐	☐
Do you collaborate with the staff to learn and address their obstacles?	☐	☐
Is the work culture friendly, emphatic, and focused on high performance?	☐	☐
Do you develop and help advance high performers who show promise?	☐	☐

Manage underperformance through rehabilitation and decisive action	Y	N
Is the job (processes, workflows, etc. the root cause of the underperformance?	☐	☐
Have you tried to rehabilitate the staff?	☐	☐
If termination is required, did you seek legal advice?	☐	☐

Improving Scheduling
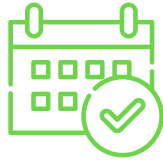
Avoid common scheduling errors	Y	N
Do you have too many appointment types and restricted time pockets in your schedule?	☐	☐
Do you gather data and analyze trends (e.g., seasonal differences in patient traffic, vacations, actual start and end times)?	☐	☐
Do you address all of the patient's current problems in one visit?	☐	☐
Do you avoid low-value encounters/interventions (informed by Choosing Wisely)?	☐	☐
Do you delegate what you can?	☐	☐

Do today's work today	Y	N
Do you offer same-day appointments?	☐	☐
At the start of the day, does your schedule only have follow-ups and new problems deferred by patients?	☐	☐
Do you have a schedule that can handle any surge?	☐	☐
Do you empty your inbox each day?	☐	☐

Manage Virtual Care	Y	N
Do you triage to determine whether a new problem can be managed by virtual or must be seen in-person?	☐	☐
Do you restrict time to a certain type of visit (i.e., virtual or in-person)?	☐	☐
Do you manage video and audio visits differently?	☐	☐

Managing Paperwork

	Y	N
Does your schedule have protected time for paperwork that limits interruptions?	☐	☐
Do you use standardization (e.g., templates, stamps, etc.) or dictation to record data efficiently?	☐	☐
Do you complete each encounter note before moving on to the next patient?	☐	☐
Do you simplify referrals by using standard templates that extract relevant information?	☐	☐
Do you simplify prescribing by doing it only during patient encounters and anticipating questions from the pharmacy?	☐	☐
Do you set aside sufficient time to complete a third-party form in one sitting?	☐	☐
Do you set appointments with the patient to gather data for third-party forms when needed?	☐	☐

After you have identified workflows to improve, ask the questions below to find efficiencies:

Workflow Optimization

	Y	N
Does it need to be done?	☐	☐
Can it be automated?	☐	☐
Is it suitable for self-serve?	☐	☐
Can it be delegated?	☐	☐