**Phase 1:**

1. Has your practice developed a vision and plan for transformation?

No vision or plan developed

Beginning to develop vision and plan

Vision and plan developed, but have not detailed how goals will be addressed

Vision and plan full developed

What is your Vision statement?

|  |
| --- |
| Click here to enter text. |

Create Date:

|  |
| --- |
| Click here to enter text. |

**Phase 2:**

1. Has your practice met its targets and has it sustained improvements in practice-identified metrics for at least one year?

Identified metrics, collected baseline information and identified IT capabilities

Monitoring metrics, not showing improvement yet

Shown improvements, not reached target

Met at least 75% of its target sustained improvement for at least 1 year

What metric does your practice want to want and improve upon over the next year?

|  |
| --- |
| Click here to enter text. |

What is target improvement after the year?

|  |
| --- |
| Click here to enter text. |

What is the base line date and when is the starting point?

|  |
| --- |
| Click here to enter text. |

What interventions is your practice implementing to meet the above goal?

|  |
| --- |
| Click here to enter text. |

1. Can your practice demonstrate that it encourages patients and families to collaborate in goal settings, decision making, and self-management?

No

Training staff in shared decision making

Developing approaches to encourage shared decision making

Demonstrate shared decision making

How does your practice incorporate shared decisions making?

|  |
| --- |
| Click here to enter text. |

1. Does your practice use a consistent approach to assign patients to provider?

No

Reviewing but not actively utilizing lists

Actively utilizing lists but not on a regular basis

Actively utilizing and updating lists on a regular basis

Do you actively review the panel to in a systematic way to allow patients to see their own PCP?

What is that process?

|  |
| --- |
| Click here to enter text. |

1. Does your practice have a method to IDENTIFY high risk patients and CREATE a care plan appropriate to the level of risk?

No process in place

Identifying and stratifying according to risk levels

Identified and stratified patients according to risk levels and is in process to

implement appropriate care plan

Implemented a process to provide appropriate care plan

What is the process in which your practice identifies and works proactively with high risk patients?

|  |
| --- |
| Click here to enter text. |

1. Does your practice have a method to IDENTIFY and DOCUMENT a care plan provided for high risk patients?

Not identified, not documenting

Identifying, not documenting

Piloting a process to identify and document

Consistently providing and documenting a care plan

How does your practice provide care plans to your high risk patients?

|  |
| --- |
| Click here to enter text. |

1. Does your practice link patients with appropriate community resources to facilitate referrals?

Not referring patients

Compiling inventory of resources, and established communication

Referring patients but not following up on referrals

Referring patients and following up on referrals

What is the referral process for your practice?

|  |
| --- |
| Click here to enter text. |

How are you identifying referrals you did not receive notes back on?

|  |
| --- |
| Click here to enter text. |

Is there a certain specialty in your community that is more difficult to coordinate care with?

|  |
| --- |
| Click here to enter text. |

1. Do you follow up with patients after an emergency room visit or discharge from hospital?

Establishing a method of receiving communication from the hospital

No process in place to follow-up with the patient

Establishing a plan to regularly follow-up but not yet consistent

Established a plan and consistently following-up

How do you know of your patients going to the emergency Room?

|  |
| --- |
| Click here to enter text. |

What is the time lag of getting this notification?

|  |
| --- |
| Click here to enter text. |

What is your process of follow up with the patients once you identify they have been in the emergency room?

|  |
| --- |
| Click here to enter text. |

1. Do you ensure that care of your patients addresses the whole person in both mental and physical health?

Not yet

Identify patients, but access is not always ensured

Identify patients and provide access, but information between facilities is not consistently shared nor coordinated

Identify patients and provide access consistently and a formal agreement is in place for full integration of care

What is the process in your practice for connecting patients to mental and physical health?

|  |
| --- |
| Click here to enter text. |

1. Does your practice use formal quality improvement techniques?

No standard improvement methodology identified or used

Improvement methodology identified but not yet in use

Beginning to incorporate improvement methodology in some areas

Improvement methodology fully implemented in the practice

Describe the quality improvement techniques your practice uses.

|  |
| --- |
| Click here to enter text. |

1. Does your practice incorporate quality improvement into the practice and empower staff to innovate and improve?

Need identified but not implemented

Some staff involved in quality improvement initiatives

Quality improvement training built in to regular staff training and onboarding

Quality improvement capability developed and encouraged with allocated time given to staff

How does your office incorporate and empower staff in practice innovation and improvements?

|  |
| --- |
| Click here to enter text. |

1. Does the practice utilize performance reports for organization and care team?

No reports are being produced or utilized

Some reports are produced, not fully shared

Reports regularly produced, goals met, but limited sharing

Reports produced, goals met, info shared, effective system for follow up

How does your practice use performance data within the hierarchy to meet goals?

|  |
| --- |
| Click here to enter text. |

Please provide example of reports being used in the care team to foster transformation.

|  |
| --- |
| Click here to enter text. |

1. Does your practice have strategies in place to cultivate joy in work and have documented results?

No

Developed Strategies

Has strategies but not measured

Has strategies and can show results thru metrics

How do you assess staff satisfaction?

|  |
| --- |
| Click here to enter text. |

What strategies do you have in place for creating joy in the workplace?

|  |
| --- |
| Click here to enter text. |

How do you assess staff satisfaction?

|  |
| --- |
| Click here to enter text. |