



# Job Aid: Starting with a Practice

## Overview

How you start with a practice can set the tone for your work with the practice. Do your homework and be well prepared for all of your meetings. Spend time getting to know the practice and building relationships with clinicians and staff before you start facilitating. Find alignment between the QI work you will be helping with and their current goals and priorities.

## First contact

- Conduct background research about the practice.
- Connect with your point of contact via email and phone.
- Identify the "practice champion" for the project.

## Observe the practice in action

- Spend 2-3 days on-site at the practice getting to know the staff before making suggestions.
- Observe how they work and introduce yourself to all the clinicians and staff.
- Keep track of practice members by creating a people "map" to help you remember relationship-building information or by taking notes on your phone.

## Build a working relationship with your practice champion

- Introduce yourself and the concept of practice facilitation.
- Establish the champion's preferred methods of communication.
- Set up a standing check-in meeting.
- Confirm your ability to access the practice EHR for chart audits and data pulls.

## Hold a kick-off meeting for the improvement effort

- Suggest involvement of diverse members of the practice.
- Create an agenda with the practice champion.
- Introduce yourself.
- Review requirements of the improvement project (if work is happening as part of an outside effort).
- Confirm their interest in the improvement project and align with the practice's priorities and goals.
- Determine next steps.



### Teach the practice how to work with practice facilitators

- Prepare “elevator” speeches, distribute fact sheets, and tell stories about work you or your colleagues have done with other practices.
- Distinguish between research and improvement work.
- Be prepared to re-teach practices how to work with you.

### Complete a practice profile

#### Structure

- Type of practice
- Business structure
- Organizational chart
- Services available on-site, virtually, or through partnerships
  - Clinics (e.g., women's, pediatrics, diabetes)
  - Behavioral health services
  - On-site labs
  - Interpreter services
  - Alternative visits (e.g., telehealth, group visits)

#### Operations

- Location/s
- Hours and schedule
- Medical records and IT systems (including patient portal)

#### Staff

- Number of clinicians and disciplines
- Number of staff and roles

#### Patient population

- Number of patients per site
- Demographics and characteristics of patients
- Insurance status of patients
- Payers by % of patients



### Quality improvement (QI) infrastructure

- QI plan
- QI team
- Performance reporting
- QI process

### Patient-centered medical home elements

- Whole-person care (e.g., social needs assessment and support)
- Team-based care
- Care coordination
- Population management tools
- Care management and support
- Patient-centered access and continuity of care

## Common problems at start-up

### Trouble connecting with key personnel:

Try email or phone message and reach out to the office manager for assistance. Evaluate whether you have appropriate point of contact. Ask for help from your practice facilitation program director if problem persists.

### No access to view EHR:

Explain you only need view-only. Explain its impact on your ability to conduct activities such as last 10 chart audits and to create performance reports. Explain your HIPAA training. Find a work-around if necessary.

### Red flags that indicate lack of practice engagement:

- Practice leadership is unavailable to participate in any meetings.
- Lack of alignment between practice priorities and QI project goals.
- Significant disruption or distress at the practice.

If there are red flags, first talk with the practice champion. Consult with your facilitation program director if issues don't get resolved.