
Endeavor for Excellence Best Practice “Before” Checklist

Last Updated 2022

How to use the E4E Checklist to create your practice’s “before” baseline score:

Consider the frequency to which each best practice technique listed below is currently utilized at your practice and then score your practice using the scoring scale provided.

E4E Best Practice Scoring Scale:

- A. Always – the Best Practice is part of your practices regular operation and is utilized almost always. An answer of “Always” does not mean that your practice is always 100%, however, it does mean that your practice regularly and routinely utilizes this technique.
- B. Usually – the Best Practice is used often, but it is not necessarily used regularly and routinely. In other words, the best practice has been used but it is not necessarily ingrained into the operation of the practice such that it is repeatedly utilized.
- C. Sometimes - the Best Practice has been used in the past and is sometimes used.
- D. Never - the Best Practice is not currently utilized at this practice.

E4E Best Practice (Impact Points):

For answers of “Always”, enter the corresponding number of eligible impact points next to each Best Practice. For example, if your practice always utilizes a daily team huddle (“Always” as described above in the E4E Scoring Scale), for item #1 you would place the number “5” next to item #1.

Note: Answers of “Usually”, “Sometimes”, or “Never” should be scored as zero impact points at this point in the E4E process. Only answers of “Always” receive impact points.

- _____ 1. Team Huddle (5 Points): This practice conducts Team Huddles on a regular basis, (at least three to four days each week).
- _____ 2. Team Huddle (5 Points): Providers participate in team huddles at least weekly.
- _____ 3. Waiting Room Rounding (5 Points): This practice consistently uses Waiting Room Rounding with front-desk personnel, or clinical staff, or leadership, keeping patients informed about their wait times.

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- _____ 4. Receptionist Helpful (5 Points): The receptionists at this practice have received formal Customer Service Training within the last 12 months.
 - _____ 5. Receptionist Helpful (5 Points): As part of their annual performance evaluations, receptionists at this practice are observed engaging patients and in turn are provided feedback from their supervisor/manager regarding their adherence to the organization's standards of behavior.
 - _____ 6. Same-day Call Back (1 Point): This practice has written policies regarding Same-day Call Back standards.
 - _____ 7. Same-day Call Back (1 Point): A random sampling of handled messages are reviewed by leadership at least weekly to ensure policies are followed and standards are met.
 - _____ 8. Same-day Call Back (1 Point): This practice returns patient phone calls on the same day, even if the patient's request has not been fulfilled, to let the patient know that their message was received and when to expect an answer or resolution.
 - _____ 9. Staff Engagement (1 Point): This practice recognizes and congratulates staff members whenever patients provide favorable comments via patient surveys or other patient feedback mechanisms.
 - _____ 10. Rx Refill Protocols (5 Points): Provider unique protocols are utilized for Rx refills.
 - _____ 11. Rx Refill Protocols (1 Point): Patients receive handouts and other education materials regarding Rx refill procedures with specific instructions to call their pharmacy for refills, when appropriate.
 - _____ 12. Rx Refill Protocols (1 Point): The practice's telephone auto-attendant (phone tree), has an Rx message to direct patients to call their pharmacy for refills.
 - _____ 13. Acute Access/Appointment Protocols (10 Points): Provider guidelines are in writing with same-day and work-in guidelines outlined to help reduce redundant occurrences of support staff having to obtain "permission" to book appointments.
 - _____ 14. Acute Access/Appointment Protocols (1 Point): This practice's telephone auto-attendant (phone tree) has "Appointments" as the 1st option.
 - _____ 15. Acute Access/Appointment Protocols (20 Points): Patients requesting "Appointments" are connected to a live person and do NOT go to voice mail.
 - _____ 16. Patient Engagement (1 Point): Practice Manager (or designated "greeter") personally greets patients during the office visit.
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- _____ 17. Patient Engagement (5 Points): Practice Manager (or designated staff member) personally places a telephone call to new patients, welcoming them to the practice.
- _____ 18. Patient Engagement (1 Point): This practice utilizes patient feedback/survey promotional materials and has on-going efforts in place to create high levels of patient awareness as it relates to encouraging patients to express their opinions.
- _____ 19. Patient Engagement (10 Points): Support staff and/or Providers are proactive and make patients aware that their opinion is valued. Patients are notified during their office visit to be expecting a patient survey.
- _____ 20. Patient Engagement (1 Point): Patient handouts are used to serve as patient reminders, reminding patients to expect a survey after their office visit.
- _____ 21. Patient Engagement (1 Point): Return/follow-up appointments are booked before the patient leaves the office.
- _____ 22. Patient Engagement (1 Point): Patients are made aware of the turnaround time related to LAB and other test results. Patients are politely and tactfully discouraged from calling the office prior to the expected availability date of their test results.
- _____ 23. Patient Engagement (5 Points): Clinical staff are proactive to review the Patient Care Plan with each patient, including allowing the patient to repeat the plan back to the clinical staff member, in the patient's own words, to help with patient compliance and confirm patient comprehension.
- _____ 24. Patient Engagement (1 Point): Clinical staff are proactive and make patients aware of the patient portal.
- _____ 25. Patient Engagement (6 Points): This practice utilizes a formal Service Recovery procedure and strives to perform Service Recovery within a 5-day Service Recovery standard, or as prescribed by the healthcare organization.
- _____ 26. Patient Portal Awareness: (1 Point): Beyond clinical staff mentioning the patient portal at the end of the patient's visit, this practice has additional patient portal awareness materials (and/or patient education offerings) available to increase/maximize the use of the patient portal.
- _____ Total: Sum the total number of "Always" points from the 26 best practices listed above.

An opportunity to compare your practice's before and after scores occurs later in the E4E process.

Note: If you have a question, please email Jerry Stone with MedicalGPS: JStone@medicalgps.com, or leave your question in the comments section on the blog post.