Module 1

Practice Facilitation as a Resource for Practice Improvement

Practice Facilitator Professional Development and Training Plan

Practice Facilitator Professional Development and Training Plan

***1. Professional Development and Training Plan for:**

***2. How much previous experience have you had working in healthcare environments?**

	No experience	Some experience	Substantial experience
Primary care (non-safety net)	○	○	○
Primary care (safety net)	○	○	○
Specialty care setting	○	○	○
Hospital setting	○	○	○
Ancillary service environment	○	○	○

Briefly describe your experience:

***3. How much previous experience have you had supporting Quality Improvement in any environment?**

- ○ No experience
- ○ Some experience
- ○ Substantial experience

Briefly describe any experience:

***4. How much previous experience have you had in collecting and analyzing data?**

- ○ No experience
- ○ Some experience
- ○ Substantial experience

Briefly describe any experience:

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***5. (General theories of change) Please rate how confident you are with your knowledge of the following topics:**

	Not at all confident	Somewhat confident	Confident	Very confident
Complexity theory	○	○	○	○
Solberg Practice improvement model	○	○	○	○
Diffusion of innovation	○	○	○	○
Empowerment theory	○	○	○	○
Asset based development	○	○	○	○
Adult learning theory	○	○	○	○

Please identify your learning goals for this area:

***6. (Practice facilitation) Please rate how confident you are with your knowledge in the following areas:**

	Not at all confident	Somewhat confident	Confident	Very confident
General background on practice facilitation	○	○	○	○
Research evidence about practice facilitation	○	○	○	○
Typical stages in the facilitation process	○	○	○	○
Core competencies of practice facilitators	○	○	○	○
Common approaches to practice facilitation	○	○	○	○
On-line resources for practice facilitators	○	○	○	○

Please identify your learning goals for this area:

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***7. (Practice facilitation) Please rate how confident you are with your skills in the following areas:**

	Not at all confident	Somewhat confident	Confident	Very confident
Assessing a practice's readiness for engaging in improvement work with a facilitator	○	○	○	○
Preparing a practice to work with a facilitator	○	○	○	○
Engaging patients as part of an improvement team	○	○	○	○
Conducting a kick-off or first meeting with a practice	○	○	○	○
Building a relationship with a practice	○	○	○	○
Identifying ineffective facilitator-practice partnerships	○	○	○	○
Facilitating meetings	○	○	○	○
Project management	○	○	○	○

Please identify your learning goals for this area:

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***8. (Knowledge of the safety net) Please rate how confident you are with your knowledge of the following areas:**

	Not at all confident	Somewhat confident	Confident	Very confident
General knowledge of the health system and how it operates	○	○	○	○
Federally Qualified Health Centers (FQHCs) and their structure, mandates and financial drivers	○	○	○	○
Community Health Centers and their structure and financial drivers	○	○	○	○
Private practices and their structure and financial drivers	○	○	○	○
Make-up and needs of their patient populations	○	○	○	○
The local healthcare system	○	○	○	○
The local healthcare environment	○	○	○	○
Payer community and their priority concerns	○	○	○	○
IPAs and other organizations supporting the primary care safety net in your area	○	○	○	○

Please identify your learning goals for this area:

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***9. (Health Service Models and Meaningful Use) Please rate how confident you are in your knowledge of the following areas:**

	Not at all confident	Somewhat confident	Confident	Very confident
Chronic Care Model or Expanded Care Model (CM)	○	○	○	○
Patient Centered Medical Home (PCMH)	○	○	○	○
Patient Centered Medical Home recognition requirements (National Committee for Quality Assurance (NCQA), other)	○	○	○	○
Patient Aligned Care Teams (PACT)	○	○	○	○
Meaningful Use requirements	○	○	○	○

Please identify your learning goals for this area:

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***10. (Quality Improvement Approaches & Tools-General) Please rate your confidence in your knowledge and skills in the following areas:**

	Not at all confident	Somewhat confident	Confident	Very confident
Model for Improvement (MFI)	○	○	○	○
Using Plan Do Study Act (PDSA) Cycles with practices	○	○	○	○
Basic concepts of LEAN	○	○	○	○
Basic concepts of Six Sigma	○	○	○	○
Academic detailing	○	○	○	○
Benchmarking	○	○	○	○
Workflow mapping	○	○	○	○
Decision support tools	○	○	○	○
Site visits	○	○	○	○
Learning collaboratives and local learning collaboratives	○	○	○	○
Identifying "exemplar" processes/practices and documenting them for spread	○	○	○	○

Please identify your learning goals for this area:

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***11. (Workflow Mapping) Please rate your confidence in helping a practice map the following key processes:**

	Not at all confident	Somewhat confident	Confident	Very confident
Answering phones	○	○	○	○
Making appointments and triage process	○	○	○	○
Messaging	○	○	○	○
Scheduling procedures	○	○	○	○
Reporting diagnostic test results	○	○	○	○
Prescription renewals	○	○	○	○
Making referrals	○	○	○	○
Pre-authorization for services	○	○	○	○
Billing/coding	○	○	○	○
Phone advice	○	○	○	○
Assignment of patients t practice	○	○	○	○
Orientation of patient to practice	○	○	○	○
New patient work-ups	○	○	○	○
Education for patients/families	○	○	○	○
Prevention assessment/activities	○	○	○	○
Chronic disease management	○	○	○	○

Please identify your learning goals for this area:

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*12. (Data Collection-General) Please rate your confidence in:

	Not at all confident	Somewhat confident	Confident	Very confident
Measuring organizational systems (capacity for improvement, functionality of key systems, leadership)	○	○	○	○
Measuring clinician and staff experience (satisfaction, burn-out, clinician-staff interaction (team work), practice climate	○	○	○	○
Measuring patient experience (how treated by practice, clinician-patient interactions in understanding, shared-decision making, relationship building)	○	○	○	○
Measuring team-patient interaction (transferring trust in clinician to trust in team)	○	○	○	○
Measuring implementation of the Care Model	○	○	○	○
Measuring implementation of the Patient Centered Medical Home	○	○	○	○
Assessing payment mechanisms (what works, what is dysfunctional, what will incentivize improvements needed)	○	○	○	○

Please identify your learning goals for this area

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***13. (Data Collection-Clinical Performance) Please rate your confidence in your knowledge and skills in the following areas:**

	Not at all confident	Somewhat confident	Confident	Very confident
Use of HEDIS quality indicators	○	○	○	○
Use of HRSA's Uniform Data System (UDS) reports	○	○	○	○
Conducting paper chart audits	○	○	○	○
Creating reports through I2I or other patient registry	○	○	○	○
Creating reports through E Clinical Works	○	○	○	○
Creating reports through Next Gen	○	○	○	○
Creating reports through Epic	○	○	○	○

Please identify your learning goals for this area

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***14. (Data Collection-Management and Display) Please rate your confidence in your knowledge and/or skills in the following areas:**

	Not at all confident	Somewhat confident	Confident	Very confident
Creating a database for survey and performance data	○	○	○	○
Managing and cleaning databases	○	○	○	○
How to determine denominators	○	○	○	○
Analyzing data for frequencies and central tendencies	○	○	○	○
Generating visual displays of data such as run charts	○	○	○	○
HIPAA rules and regulations for protecting personal health information	○	○	○	○

Please identify your learning goals for this area

***15. (Creating QI Infrastructure and Capacity in a Practice) Please rate your confidence in your knowledge and skills in the following areas:**

	Not at all confident	Somewhat confident	Confident	Very confident
Creating priority for change in practice/organizational leadership	○	○	○	○
Forming a QI committee or improvement team	○	○	○	○
Creating an improvement plan or QI charter	○	○	○	○
Optimizing team functioning	○	○	○	○
Using data to drive improvement (identify needs, monitor progress)	○	○	○	○
Creating systems for routing performance monitoring	○	○	○	○

Please identify your learning goals for this area

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***16. (Managing Relationships) Please rate your confidence in your knowledge and skills in the following areas:**

	Not at all confident	Somewhat confident	Confident	Very confident
Building relationships with clinicians and staff	○	○	○	○
Managing and resolving interpersonal conflict	○	○	○	○
Motivating staff and clinicians to engage in improvement activities	○	○	○	○
Working with diverse individuals (MAs, RNs, MDs/DOs, patients, administrative staff)	○	○	○	○
Maintaining healthy communication (avoiding triangulation, etc)	○	○	○	○
Maintaining healthy boundaries with staff/clinicians (building capacity vs. doing for)	○	○	○	○

Please identify your learning goals for this area

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***17. (Implementing Care Teams_General) Please rate your confidence in your knowledge and skills in the following areas:**

	Not at all confident	Somewhat confident	Confident	Very confident
Knowledge of best practices and exemplars in team based care	○	○	○	○
Training practices in concepts of team bsed care and associated culture change	○	○	○	○
Redefining clinical roles and responsibilities to support team based approaches to care	○	○	○	○
Licensing limitations for roles/clinicians (what each can and cannot do)	○	○	○	○
Redesigning workflow to support team based care	○	○	○	○

Please identify your learning goals for this area

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***18. (Implementing Care Teams_Workflow for Specific Patient Groups) Please rate your confidence in your knowledge and skills in helping practices stratify patients and redesign workflow for team based care for:**

	Not at all confident	Somewhat confident	Confident	Very confident
Healthy/preventive care	○	○	○	○
Acute problems (major/minor)	○	○	○	○
Chronic conditions (diabetes,yhper t ension, CHF)	○	○	○	○
Complex care needs	○	○	○	○
Mental health	○	○	○	○
Chronic pain	○	○	○	○
Women's health	○	○	○	○
Pregnancy/well child care	○	○	○	○
Palliative/end of life care	○	○	○	○

Please identify your learning goals for this area

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***19. (Implementing Care Teams_Workflow for Key Visit Related Administrative Activities) Please rate your confidence in your knowledge and skills in helping practices map and redesign workflow related to care team functioning in key visit related administrative activities:**

	Not at all confident	Somewhat confident	Confident	Very confident
Registration	○	○	○	○
Making appointments	○	○	○	○
MA role (pre-visit, vitals, agenda setting, checking chronic and preventive care needs and ordering them)	○	○	○	○
Receipt of test results- Clinician (lab, x-ray, other results)	○	○	○	○
Receipt of test results - Patient (normal, slightly abnormal, very abnormal)	○	○	○	○
Internal messaging (which emails go to whom, action required)	○	○	○	○
Prescription refills (chronic meds, acute meds, secure script meds)	○	○	○	○
Billing workflow	○	○	○	○
Filling out forms (clinician role, other team member role)	○	○	○	○

Please identify your learning goals for this area

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***20. (Panel management) Please rate your confidence in your knowledge and/or skills in the following areas:**

	Not at all confident	Somewhat confident	Confident	Very confident
General knowledge of principles and processes of panel management	○	○	○	○
Knowledge of best practices and exemplars in implementing panel management	○	○	○	○
Training practices in concepts of panel management and creating culture change to support it	○	○	○	○
Training panel manager and creating protected time	○	○	○	○
Helping practice define what decisions panel managers can make (ordering labs, x-rays, titrating meds via protocol, referring patients to classes, etc)	○	○	○	○
Optimizing EHRs and creating patient registries and reporting systems to support panel management	○	○	○	○

Please identify your learning goals for this area

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***21. (Creating Panels) Please rate your confidence in your knowledge and skills in the following areas:**

	Not at all confident	Somewhat confident	Confident	Very confident
Knowledge of best practices in creating patient panels	○	○	○	○
Training practices in key elements of assigning patients to panels	○	○	○	○
Optimizing HIT systems to support assigning patients to panels	○	○	○	○
Assisting practices in assigning patients to panels	○	○	○	○
Evaluating the implementation of panels	○	○	○	○
Implementing policies/procedures that support continuous empanelment	○	○	○	○

Please identify your learning goals for this area

***22. (Assessing & Improving Self-Management Support for Patients) Please rate your confidence in your knowledge and skills in the following areas:**

	Not at all confident	Somewhat confident	Confident	Very confident
Knowledge of best practices in self-management support including the use of health coaches	○	○	○	○
Assessing a practice's self-management support resources and processes	○	○	○	○
Helping practices enhance their self-management support services	○	○	○	○

Please identify your learning goals for this area

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***23. (Care Coordination) Please rate your confidence in your knowledge and skills in the following areas:**

	Not at all confident	Somewhat confident	Confident	Very confident
Knowledge of methods of care coordination (specialists, ED, hospitalists (admission, during stay, discharge), pharmacy, lab/imaging, home care, hospice)	○	○	○	○
Training practices in general concepts of care coordination	○	○	○	○
Assisting practices to implement care coordination	○	○	○	○
Payment and care coordination	○	○	○	○

Please identify your learning goals for this area

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***24. (Meaningful Use) Please rate your confidence in assisting practices in redesigning the following workflows to achieve Meaningful Use:**

	Not at all confident	Somewhat confident	Confident	Very confident
Recording patient demographics	○	○	○	○
Recording vital signs electronically	○	○	○	○
Maintaining up to date problem list	○	○	○	○
Maintaining active medication list	○	○	○	○
Maintaining active allergy list	○	○	○	○
Recording smoking status	○	○	○	○
Providing patients with clinical summaries for each office visit	○	○	○	○
E-prescribing	○	○	○	○
Drug-drug and drug-allergy interaction checks	○	○	○	○
Exchanging electronic information with other sites of care	○	○	○	○
Implementing a decision support rule and track compliance with the rule	○	○	○	○
Systems to protect privacy and security of patient data	○	○	○	○
Report clinical quality measures to CMS or states	○	○	○	○
Generate lists of patients for QI or outreach	○	○	○	○
Electronic health education resources	○	○	○	○
Medication reconciliation between care settings	○	○	○	○
Summary of are record for referrals and transitions	○	○	○	○
Immunization data to regional rgi st ries	○	○	○	○
Surveillance data to public health agencies	○	○	○	○
Patient reminders for prevention/chronic care	○	○	○	○
Patient access t lab	○	○	○	○

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results, problem and medication lists, allergies				
Drug formulary check	◯	◯	◯	◯
Lab results into EHR	◯	◯	◯	◯

Please identify your learning goals for this area

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***25. (Professionalism) Please rate your confidence in your knowledge and skills in the following areas:**

	Not at all confident	Somewhat confident	Confident	Very confident
Documenting your encounters with your practice in a PF "practice registry" or encounter form	○	○	○	○
Communicating your challenges/needs and successes to your supervisor	○	○	○	○
Communicating your challenges/needs and successes to other PFs	○	○	○	○
Managing your time during practice encounters and administrative time	○	○	○	○

Please identify your learning goals for this area

26. Please describe any other skills/knowledge you have that are relevant to PF that may be resources for your program and other PFs in your program:

27. Please describe any other areas in which you believe you need training/support in order to feel confident as a PF: