

Improvement Checklist



STEPS TO IMPLEMENTING THE OFFICE INVENTORY

The Office Systems Inventory can be used at the outset of your office improvement efforts to provide a baseline and assess progress as you implement changes. The Inventory can be reviewed by a group of providers and staff who represent diverse roles within the practice. The group can use the Inventory to guide discussion about past and needed improvements.

Planning and Prioritizing with the Office Systems Inventory

- The lead clinician, lead nurse, office administrator, and one or two other clinicians and staff in your office should complete the Office Systems Inventory as a team.
- You may find that you have differences of opinion about whether a particular element of an office system is in place. Lack of agreement may indicate that an office system is not clearly understood by all.

Implementing the Office Systems Inventory

- Distribute the Office Systems Inventory to all team members with a deadline.
- Set up a meeting to discuss the results with your team.
- Seek input from staff outside the original team for additional perspectives and insights, if necessary.
- Answer each question from the perspective of one clinical site that supports anticipatory guidance.
- Based on your discussion of the results from the Office Systems Inventory Tool, select a limited number of systems on which to focus your efforts.

Scoring the Office System Inventory

- The scoring on the Inventory is designed to act like a screen to help you identify which of the key areas-- anticipatory guidance and parent education, screening and assessment, community linkages, family interactions--where your office needs an office system or needs to improve its existing systems. The Inventory produces a score for each section as well as a total score. If your overall score is above 20, your practice likely has a number of well-developed office systems in place. If your overall score is lower than 10, your office probably does not have a large number of office systems. If your score falls between 10 and 20, it's likely that there is a need for system improvement in several areas. In all cases, the sub-scores for each system will help you identify specific opportunities for improvement.

Key Elements of Quality Preventive Care to Review

- After completing the Office Systems Inventory, you may want to review your office's approach to preventive services. Some questions to ask are:
 - Do you have practice guidelines that clinicians have agreed upon? Are they part of a schedule for well-child visits? Is there a system to assess what services and risk screenings young children need at each visit? Do you have structured screening tools that you use in your practice? How is the preventive services work distributed between clinical and non-clinical staff?

MONITORING PROGRESS

- It may be helpful to fill out the Office Systems Inventory three or four times over the next year to monitor your progress in the development of office systems. Your scores might "decline" initially even though you have made changes in your practice; this is likely the result of a better understanding of what a good system of care should look like in your office. Over time you should see an overall improvement on your scores.