Sometimes it feels as though your physician private practice is buried in office documents. Forms for internal practice records. Forms for external business interactions. Financial forms. Medical forms. Government forms. And all of them need to be consistent and accurate.

Access to business and medical documents is critical to the successful operation of medical services, according to Taylor Johnson, the AMA’s manager of physician practice development, and private practices have a particularly important need.

“Private practices have no access to the resources that larger health systems have,” she said. “Many smaller private practices did not have access to standardized forms at all when they began their practice,” she said.

“One of the No. 1 resources that private practices need is access to the forms that are in general use among other medical systems,” added Johnson, who managed a private practice prior to joining the AMA.

Johnson and Meghan Kwiatkowski, program manager of private practice sustainability at the AMA, led a project to aggregate the most commonly used business and medical forms and created an appendix (PDF) to the AMA STEPS Forward® Private Practice Playbook. Together, they organized information and resources to help physicians navigate medical practice business operations and efficiency solutions to create and support a thriving business.

Dozens of ready-to-use forms

The “AMA STEPS Forward® Private Practice Playbook: Sample Forms Appendix” (PDF) is a collection of templated forms for independent physician practices that address patient, employee and administrative needs. The appendix includes 39 editable Microsoft Word documents that physician
private practices can use immediately to build and maintain their records. The documents have been reviewed by the AMA office of general counsel, as well as outside agencies including government and private payors.

The appendix includes four categories:

- New patient packet.
- Patient documents.
- Administrative documents.
- Employee documents.

Private practices can use the forms in various aspects of their business and medical operations.

“There’s plenty that can go wrong with the capture and maintenance of information in a private practice and the need to maintain accurate information on business and medical operations continues to grow as their requirements increase,” Kwiatkowski explained.

For example, telehealth was rarer prior to the pandemic, used most commonly in rural areas where physicians had difficulty reaching their patients. But during the pandemic, telehealth has become more commonly used, and physicians and payers created new approval and data forms to capture telehealth and other treatment modes and ensure proper payment, Johnson said.

The appendix also includes medical treatment forms such as medication logs, medical release forms, and other patient-information documents, such as price lists.

**Forms can affect bottom line**

Other forms available include standard job descriptions and new employee-onboarding forms, as well as other human resources support forms.

Collecting information about patients in a standardized fashion is essential, as is ensuring that data-collection tools match the forms and information requirements from other participants in the health care community, Kwiatkowski said.

The Centers for Medicare & Medicaid Services, for example, has a sophisticated standard for information about patients and claims. Without the relevant information, physicians will have difficulty getting paid for approved treatments and procedures, Johnson noted.

It takes astute clinical judgment as well as a commitment to collaboration and solving challenging problems to succeed in independent settings that are often fluid, and the AMA offers the resources


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and support physicians need to both start and sustain success in private practice.

Find out more about the AMA Private Practice Physicians Section, which seeks to preserve the freedom, independence and integrity of private practice.