In many medical settings, proven workflow improvements could increase efficiency and quality of care, while creating a better workday for everyone at the practice—if only someone would get the ball rolling.

Private practice physicians have an edge in making that happen. As owners of their own practices, these physicians don’t have to ask for permission to take initiative. Private practice physicians can implement proven practice improvement strategies and tailored workflow processes that meet their unique practice needs.

Guidance on how to put this into action can be found at the AMA’s STEPS Forward™ open-access platform featuring more than 50 modules that offer actionable, expert-driven strategies and insights supported by practical resources and tools.

The potential for greater autonomy makes private practice an attractive option for physicians looking to have more control over their practice of medicine. It takes the same kind of astute judgement and effective collaboration with colleagues to succeed in an independent setting as it does to successfully care for patients, and the AMA offers the resources and support physicians need to start and sustain success on the path to private practice.

Run more productive meetings

A common thread throughout many of the modules is team-based care—everyone working seamlessly together. The “Team Meetings” module details how to direct energy so those working closest to an inefficient situation can join “together to analyze the way work is currently being done and take steps to improve efficiency.” Here are some highlights.

Focus, frequency and format are meeting essentials. Time of day, duration, and frequency are up to you and your team, but meet regularly and at a consistent time. Setting dedicated time aside for team
meetings tells the team that their contributions, and the collaborative improvement process team meetings facilitate, are valued. Use agenda templates to keep conversation on point and meetings on track. An assigned recorder for each meeting can keep track of action items, assigned point persons, and due dates that come out in discussion.

Progress is important, but so is encouraging a positive team culture.

Work together to solve problems and find improvements as a group. Rotate the meeting role assignments, like chairperson, timekeeper and recorder, to encourage everyone to participate fully—all suggestions are equal.

As a team, create meeting ground rules to establish good meeting practices and ensure a supportive and respectful environment for your team meetings. Foster teamwork and connections by including fun activities and celebrating successes as part of your regular team meeting agenda. All team members should be encouraged to take part in the discussion. The understanding should be that everyone is expected to respect one another and show understanding for another’s point of view. Constructive, not negative, responses should also be the norm.

Regular, open communication is key to improving any practice’s productivity, efficiency, and team culture, and regular team meetings are just one part of the equation.

Team huddles are brief, lasting only 10 to 20 minutes, and are held once or twice a day with relevant team members to help ensure an efficient clinic day with fewer surprises.

Plan out the patient visit beforehand

The “Pre-Visit Planning” module explains how to promote completeness of care while freeing up physician time to interact with patients instead of paperwork. Here are some key steps.

When one visit ends, the process starts for the next. Create an appointment for patients before they leave the office. Completing laboratory tests before the next visit is fundamental to pre-visit planning—learn more about it in the “Pre-Visit Laboratory Testing” module.

Send patients a reminder as the appointment nears. With more complex patient cases, consider a nurse or medical assistant phone call or email to update medications and set the agenda for the patient’s upcoming visit. On the visit day, a nurse or medical assistant can prepare test results and share important information with the physician in the daily team huddle.

Use checklists to promote comprehensive care. Start at the end of an appointment with a visit planner checklist that the physician can use to quickly note the interval and labs needed for the next visit. As
the visit approaches, a paper or EHR pre-visit checklist can be used to identify care gaps such as preventive services or immunizations.

Patients have their own paperwork to complete that will make a visit more complete. A questionnaire, either on paper or before the visit via online portal, gives the patient an opportunity to say what they expect from the visit and can capture responses to common screening questions—for example, pain, depression or smoking status—to provide as complete an agenda as possible before the physician enters the exam room.

**Do Rx renewals once a year**

“Annual Prescription Renewal” is a practice protocol that saves time—possibly hundreds of work hours a year for a 1,000-patient primary care office—and can help improve patients’ medication adherence by consolidating prescriptions to a single refill date, eliminating the need for patients to make multiple trips to the pharmacy each month and closing gaps caused by waiting for refills.

At an annual comprehensive visit, after a review of the patient’s prescriptions, renewals are written for the maximum duration allowed—typically 12 to 15 months. If a prescription renewal request comes in outside an annual visit, check of all the patient’s medicines and renew all to the maximum period.

STEPS Forward is part of the AMA Ed Hub™, an innovative educational portal that gives doctors and other health professionals a streamlined way to earn, track and report CME activities spanning clinical, practice-transformation and professionalism topics.

The AMA offers in-depth resources to consider all practice options and step-by-step guidance for those physicians who want more clinical autonomy.


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