



OFFICE SYSTEMS INVENTORY TOOL

Practice Name: _____ Date of Inventory (mm/dd/yyyy): __ __/__ __/20__ __ __

Instructions: The purpose of this tool is to help a practice team assess the office systems in place that support preventive and developmental services. It is recommended that the *entire project team complete this tool together*. The project team in each office may vary somewhat; it may include the lead physician, lead nurse, office administrator, and one or 2 other clinicians and staff. This tool will help you assess the degree to which systems exist in your practice in the following areas:

Practice Guidelines

Check off each item your practice currently uses or has in place.

- The clinicians have agreed as a group about which anticipatory guidance topics to provide and when to provide them.
- Our practice uses a preventive services prompting sheet to keep track of preventive services, anticipatory guidance, and parent education.

Score: __/2

Screening/Prompting

- Our practice uses a system to assess what services and risk screenings each child needs and to alert the physician about these needs. Such a system might be chart screening prior to a visit, or a computer prompt or other “flag” that is placed on the front of the chart or on the encounter form.
- This screening and prompting system is used at both well-child and non–well-child visits.

Score: __/2

Recall and Reminder

- Our practice has a way of reviewing patients’ preventive services needs to ensure that nothing has been missed and to identify and contact patients who have not come in at appropriate intervals (eg, sending reminders to all children of a certain age, or reviewing charts to find those children who are behind on services).
- Our practice has a way of identifying follow-up needs for patients who do not attend scheduled appointments.
- Someone other than the physician is responsible for identifying children who are behind on preventive services.
- Our practice has a relationship with the local health department or another similar agency that can assist with tracking and following up on patients who have not received needed preventive services.

Score: __/4



Team-based Care

- A staff person is responsible for ensuring that screening and structured assessment is used routinely.
- In our practice, physicians and nurses generally work together in well-established teams.
- There is a person responsible for training staff about office anticipatory guidance and parent education guidelines as well as each staff person's role in implementing the guidelines.

Score: __/3

Linking With the Community

- Our practice maintains a list of commonly used community resources that parents need, and this list is easily accessible to everyone in our practice who needs it.
- Someone is responsible for regularly updating the practice's community resource information (eg, checking contact information, confirming eligibility).
- There is a central contact and referral resource in the community that is maintained outside the practice (eg, an agency to call who can handle referrals).
- The materials we use for community referrals are organized and accessible to all staff in the practice.

To coordinate referrals with community agencies, we currently have

- A standard way to communicate written information about patients we send to community agencies.
- A standard way to request written information back from the referral agency (eg, non-carbon forms).

Score: __/6

Monitoring Quality of Care

- We have a system to track whether families completed referrals outside the practice.
- In the past 12 months, our practice has reviewed our guidelines and updated them as needed.
- In the past 12 months, someone at our practice has measured our performance of anticipatory guidance and parent education with a chart review or parent survey.
- Our practice provides the results of chart reviews to all clinicians.

Score: __/4

Downloaded from: <http://brightfutures.aap.org/>

