



## Practice Readiness Assessment Form for Front Office

Practice Name:

Person Filling Out:

Instructions: Each person should fill out this assessment from their perspective. This form can be filled out electronically. To enter text into a field, click on the field and begin typing. To check a box, simply click on it using your mouse. When you have completed the form, please save a copy and email it to [servicebureau@mcms.org](mailto:servicebureau@mcms.org).

If you find it easier to fill out by hand, please print the form and fax or mail the hard copy to the Service Bureau.

Time estimate to complete: 10 minutes. Block out and protect time for people to complete.

### Front Office: Scheduling

Who in the practice is allowed to schedule patients?

Are time slots reserved for same day appointments? Yes No

Does the practice double or triple book? Yes No

What procedures do you follow when scheduling appointments for **new** patients?

What procedures do you follow when scheduling appointments for **established** patients?

Are appointments confirmed within 24 to 48 hours of scheduled visit? Yes No

If yes, how?

Are cancellations and no-shows called to reschedule? Yes No

### Front Office: Check-in

Where do patients check-in?

Is an explanation of expected wait time given? Yes No

What procedures do you follow when registering **new** patients?

How are **new** patients distributed among physicians?

Do the physicians share care for **established** patients? Yes No

What is the procedure for registering an **established** patient?

Is an insurance card reviewed at check-in for each visit? Yes No

Is eligibility checked at each visit? Yes No

Is personal information updated each visit? Yes No

### Front Office: Messages

What is the procedure for taking a phone message? How is the phone message documented?

How do phone messages from patients get routed?

Do patients e-mail the practice? Yes No

If yes, explain how the e-mail is documented.

If yes, how do e-mail messages from patients get routed?

Is there a procedure for triaging messages? Yes No

What expectations are given for time of call back?

### Waiting Room

Does the practice track wait times? Yes No

How do staff know when to call a patient back to the exam room?

Who summons the patient to the clinical area/exam room?

Questions or comments? Enter them in the field below.

Thank you for completing this form.