

## ASSESSMENT QUESTIONNAIRE

Thank you for your time in filling this out for us. The more we know about your practice, the more we can show you how SpringCharts can easily be customized for "Your Practice, Your Way."

### GENERAL:

1. Who are the key people in your practice that will be making the decision for your EHR solution?

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2. Who is the "Champion Provider" in your practice? \_\_\_\_\_

3. What are you and your staff looking for most in an EHR solution? \_\_\_\_\_

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4. What PMS system are you currently using? \_\_\_\_\_

5. In practices with more than one provider, do you see each other's patients? \_\_\_\_\_ Yes \_\_\_\_\_ No

6. How are emergency calls at night handled at your office? (i.e., must drive into the office to review the chart before making a decision?)

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7. Where are your "bottle-necks"? \_\_\_\_\_

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8. How do you communicate intra-office currently? (i.e. messages, reminders, etc.)

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### APPOINTMENTS:

9. Do you schedule appointments for something or someone in-house other than a provider (such as "shot room", "Lab", "x-ray") If yes, who or what?

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10. Do you have "flags" over your exam doors or elsewhere in your office? How are these flags used?

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**OFFICE VISIT DOCUMENTATION:**

11. Briefly explain your workflow, from the time the patient walks in the door until they leave the office. (Who checks in the patient, how do you notify back office that the patient is ready, who takes and enters vitals, how is provider notified patient is ready, labs, etc.)

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12. Please check the sections of the patient's chart note that a nurse (or the person taking the patient into the exam room) would enter into the office visit note prior to the doctor examining the patient.

- |  |                                       |                              |                                    |
|--|---------------------------------------|------------------------------|------------------------------------|
| <input type="checkbox"/> Chief Complaint | <input type="checkbox"/> HPI          | <input type="checkbox"/> PMH | <input type="checkbox"/> SH        |
| <input type="checkbox"/> ROS             | <input type="checkbox"/> Current Meds | <input type="checkbox"/> FH  | <input type="checkbox"/> Allergies |
| <input type="checkbox"/>                 | <input type="checkbox"/>              | <input type="checkbox"/>     | <input type="checkbox"/>           |

13. How do you now or plan on sending your charges? (i.e., Billing Service, pass charges to your PMS, print out the Routing Slip/Super Bill Form, etc.)

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14. What level do you normally code your office visits? \_\_\_\_\_ 3 \_\_\_\_\_ 4 \_\_\_\_\_ 5

15. Do you feel that you sometimes under code an office visit? \_\_\_\_\_ Yes \_\_\_\_\_ No

16. Do you send H&Ps? \_\_\_\_\_ Yes \_\_\_\_\_ No

17. Do you give Patient Instructions to your patients? \_\_\_\_\_ Yes \_\_\_\_\_ No

18. Do you send referral or thank you letters to other providers? \_\_\_\_\_ Yes \_\_\_\_\_ No

19. Do you send any other type of letters? \_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, to whom? \_\_\_\_\_

**PHONE CALLS:**

20. How do you now handle phone calls for things such as Rx refills, patient questions, etc.?

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21. Do you have to pull the patient's charts to be able to do a refill? \_\_\_\_\_ Yes \_\_\_\_\_ No

22. How long do patients typically have to wait before their Rx is called in? \_\_\_\_\_

**PULLING CHARTS:** (FYI - **Filing Charts / Finding Lost Charts** – busy practices usually have .25 FTE per physician doing nothing but filing. 25 FTE @ \$20,000 per year = **\$5,000 per year per physician** in savings.)

23. When do you have to pull charts in your practice? (i.e. insurance, filing lab reports, other paperwork?)

\_\_\_\_\_  
\_\_\_\_\_

24. Do you ever have problems "finding" a chart in your office? \_\_\_\_\_ Yes \_\_\_\_\_ No

25. Do you have more than one location that a patient could be seen? \_\_\_\_\_ Yes \_\_\_\_\_ No

**LAB RESULTS:**

26. How do you handle lab results? \_\_\_\_\_

27. What labs do you normally use? \_\_\_\_\_ Quest \_\_\_\_\_ LabCorp \_\_\_\_\_ Spectrum

\_\_\_\_\_ Carilon \_\_\_\_\_ WestCliff \_\_\_\_\_ Hunter \_\_\_\_\_ Interpath \_\_\_\_\_ Antek

Other: \_\_\_\_\_

28. How do you notify patients notified of their lab results? \_\_\_\_\_ Letter \_\_\_\_\_ Phone Call

Other: \_\_\_\_\_

**IMMUNIZATIONS (if applicable):**

29. How do you keep track of when a patient needs an immunization? \_\_\_\_\_

29. What do you currently use for immunization records for school, etc? \_\_\_\_\_

It would be most helpful to see how you currently document your office visit notes. Would you mind faxing us a copy of a patient's typical office visit note and/or forms that you use from your practice?

**\*If so, please eradicate any pertinent patient identifiers prior to faxing to Spring Medical Systems, Inc.:**

**Attention of: Len Giacchi at our Fax# (281) 537-5281**