



Practice Efficiency Qualitative Survey

CHECKLIST ITEMS		SCORE		
Items to be reviewed are checked "✓" in the left column; score is indicated by a "✓" in the right columns; a null "Ø" score indicates that data was not available, flagging the item for closer study.		+	-	Ø
WEBSITE AND ONLINE REPUTATION ANALYSIS				
Online Visitor logging and tracking				
Conversion Analysis				
Web visit/In-person visit ratios				
Portal activity				
Chat support functionality & usage				
Call-to-action links functionality & usage				
Practice Reputation				
Websites				
Blogs				
SEO rankings				
SCHEDULING				
Time slots usage				
No-shows data and policies				
Overbooking practices				
APPOINTMENTS (ENCOUNTER ASSESSMENT)				
Patient engagement				
Sign-in				
Demographics, history & indications update				
Vitals and rooming				
Patient/provider face-to-face time				
Charting				
Speed/efficiency				
Content/quality				
Ongoing Services (AWV, CCM, TRANSITIONAL CARE, ETC.)				
Staff requirements/overhead review				
Potential vs actual revenues				
Execution and documentation				
BILLING PROCESSES				
Patient eligibility/verification				
Pre-appointment				
Sign-in				
Post demographics, history & indications update				
Point-of-service co-pay and deductible collections				
Estimation of patient charges				
Patient charges and coverage communications				
CODING & BILLING ASSESSMENT				
Coding accuracy				
Claim submittals				
Denials				
Cost factors				
Staff profiles				
Business procedures				
AR & FOLLOW-UP ASSESSMENT				
Final payment				
Timing of 1 st contact with patient				
Timing and methods of subsequent contacts				
AR procedures for coordinating with insurance companies				
Insurance company reimbursement schedule review				
Insurance company payment time profiling				
Appointment schedule/claim submittal cross reference check				
Notes:		SCORE ASSESSMENT:		