ANNALS OF FAMILY MEDICINE

Online Supplementary Material

Jaén CR, Crabtree BF, Palmer R, et al. Methods for evaluating practice change toward a patient-centered medical home. *Ann Fam Med.* 2010;8(Suppl 1):S9-S20.

http://www.annfammed.org/cgi/content/full/8/Suppl_1/S9/DC1

Supplemental Appendix 6. Practice Environment Checklist

The appendix begins on the next page.

TransforMED

Practice Environment Checklist

Date:

Q1 ☐

Q2 **Review timepoint**

First review (July 3, 2006) ☐

Second review (April 1, 2007) ☐

Third review (January 1, 2008) ☐

Site ID:

Q3 ☐

Facilitator ID:

Q4 ☐

Completely fill in the boxes that describes how much you agree or disagree with the following statements about this practice. Please do not fold the survey.

MINDFULNESS

Please indicate how strongly you agree or disagree with each statement

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q5	People in this practice actively seek new ways to improve how they do things.	○	○	○	○	○
Q6	This practice is able to easily adjust routines to deal with unusual situations.	○	○	○	○	○
Q7	People in this practice are thoughtful about how they do their jobs.	○	○	○	○	○
Q8	People at all levels of this office openly talk about what is and isn't working.	○	○	○	○	○

Notes:

Q9

HEEDFUL INTERACTIONS

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q10	People in this practice understand how their jobs fit into the rest of the practice.	○	○	○	○	○
Q11	People are aware of how their actions affect others in this practice.	○	○	○	○	○

Notes:

Q12

RESPECTFUL INTERACTION

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q13	Most people in this practice are willing to change how they do things in response to feedback from others.	○	○	○	○	○
Q14	Opinions are valued by others in this practice.	○	○	○	○	○
Q15	People in this practice are comfortable telling others what they really think.	○	○	○	○	○

Notes:

Q16

DIVERSITY

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q17	Everybody in this practice tends to think the same about important issues.	○	○	○	○	○
Q18	People in this practice actively seek out the opinions of others.	○	○	○	○	○

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q19	This practice encourages everyone (front office staff, clinical staff, nurses, and clinicians) to share ideas.	○	○	○	○	○
Q20	People in this practice are able to disagree but still get along with each other.	○	○	○	○	○

Notes:

Q21

TRUST

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q22	People in this practice feel they need to check all information they receive before acting on it.	○	○	○	○	○
Q23	People in this practice can rely on the others to do their jobs well.	○	○	○	○	○

Notes:

Q24

SOCIAL AND TASK INTERACTION

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q25	Staff rarely get together to talk about their work.	○	○	○	○	○
Q26	People in this practice regularly talk about their personal lives.	○	○	○	○	○

Notes:

Q27

RICH AND LEAN COMMUNICATION

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q28	Difficult problems are solved through face-to-face discussions in this practice.	○	○	○	○	○
Q29	Everyday information is communicated in this practice through memos, post-it notes, or emails.	○	○	○	○	○

Notes:

Q30

REFLECTION

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q31	People in this practice regularly take time to reflect on how they do things.	○	○	○	○	○
Q32	After trying something new, people in this practice take time to think about how it worked.	○	○	○	○	○

Notes:

Q33

LEADERSHIP

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q34	The leadership in this practice is available for consultation on problems.	○	○	○	○	○
Q35	The practice leadership makes sure that people in this practice have the time and space necessary to discuss changes to improve care.	○	○	○	○	○

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q36	Practice leadership promotes an environment that is an enjoyable place to work.	○	○	○	○	○
Q37	Leadership in this practice creates an environment where things can be accomplished.	○	○	○	○	○

Notes:

Q38

LEARNING CULTURE

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q39	This practice learns from its mistakes.	○	○	○	○	○
Q40	It is hard to get things to change in this practice.	○	○	○	○	○
Q41	This practice tends to be very flexible.	○	○	○	○	○
Q42	This practice likes to be on the cutting edge of new ideas.	○	○	○	○	○

Notes:

Q43

SENSEMAKING

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q44	People in this practice have the information that they need to do their jobs well.	○	○	○	○	○
Q45	When people in this practice experience a problem they make a serious effort to figure out what's really going on.	○	○	○	○	○

Notes:

Q46

WORK ENVIRONMENT - GENERAL

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q47	Most of the people who work in this practice seem to enjoy their work.	○	○	○	○	○
Q48	Working in this practice is stressful.	○	○	○	○	○
Q49	Work expectations are clear.	○	○	○	○	○
Q50	People have what they need to do their work well.	○	○	○	○	○
Q51	People receive frequent and helpful feedback about their work.	○	○	○	○	○
Q52	People in this practice believe they have many opportunities to grow in their work.	○	○	○	○	○

Notes:

Q53

TEAMWORK

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q54	People in this practice operate as a real team.	○	○	○	○	○
Q55	Most people in the practice can take initiative to improve a patient's care.	○	○	○	○	○

Notes:

Q56

ATTENTION TO FITNESS LANDSCAPE - CONNECTION TO COMMUNITY

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q57	This practice is aware of community resources that are accessible to patients.	○	○	○	○	○
Q58	This practice works effectively together as a team with community organizations.	○	○	○	○	○
Q59	People in this practice are connected with community organizations that serve patients.	○	○	○	○	○

Notes:

Q60

ATTENTION TO FITNESS LANDSCAPE - CONNECTION TO HEALTH SYSTEM

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q61	This practice works well together with the health care system.	○	○	○	○	○
Q62	People in this practice are connected to people in other practices.	○	○	○	○	○

Notes:

Q63

CULTURAL SENSITIVITY

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q64	People in this practice believe cultural issues are important in their interactions with patients.	○	○	○	○	○
Q65	People in this practice believe cultural issues are important in their interactions with heatlh professional colleagues.	○	○	○	○	○

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q66	People in this practice are comfortable caring for patients from culturally diverse backgrounds.	○	○	○	○	○
Q67	People in this practice are comfortable working with health care professionals from culturally diverse backgrounds.	○	○	○	○	○
Q68	People in this practice are aware of the factors underlying healthcare disparities.	○	○	○	○	○
Q69	People in this practice believe this practice provides culturally sensitive care.	○	○	○	○	○

Notes:

Q70

PATIENT SAFETY

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q71	People in this practice are actively doing things to improve patient safety.	○	○	○	○	○
Q72	Staff feel like their mistakes are held against them.	○	○	○	○	○
Q73	Mistakes have led to positive changes here.	○	○	○	○	○
Q74	It is just by chance that more serious mistakes don't happen in this practice.	○	○	○	○	○
Q75	Patient safety is never sacrificed to get more work done.	○	○	○	○	○
Q76	Staff worry that mistakes they make are kept in their personnel file.	○	○	○	○	○
Q77	People in this practice openly discuss errors that happen in the practice.	○	○	○	○	○
Q78	Staff are afraid to ask questions when something does not seem right.	○	○	○	○	○
Q79	When things get really busy, people in this practice are expected to work faster, even if it means taking shortcuts.	○	○	○	○	○

Notes:

Q80

ONLINE PLATFORM

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q81	The use of electronic medical records during patient visits interferes with the doctor-patient relationship.	○	○	○	○	○
Q82	The practice can easily identify patients with a particular disease or medication.	○	○	○	○	○
Q83	Everyone in this practice has access to the information they need for patient care and their work when they need it.	○	○	○	○	○

Notes:

Q84

OVERALL & OTHER

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q85	This practice is a place of joy and hope.	○	○	○	○	○
Q86	This practice is enthusiastic about its participation in the National Demonstration Project.	○	○	○	○	○
Q87	This practice encourages patients to share information about complementary and alternative care and/or supplements that they might be using.	○	○	○	○	○
Q88	This practice and its clinicians give the attention that patients feel they need to spiritual health and well-being.	○	○	○	○	○
Q89	This practice and its clinicians encourage patients to spend more time outside in nature.	○	○	○	○	○

Notes:

Q90

KOTTER'S PRACTICE CHANGE FACTORS

Please indicate how strongly you agree or disagree with each statement.

		Strongly Disagree (1)	*Disagree (2)*	*Neutral (3)*	*Agree (4)*	*Strongly Agree (5)*
Q91	There is a strong sense of urgency about needing to change how the practice does its work.	○	○	○	○	○
Q92	Leadership strongly supports practice change efforts.	○	○	○	○	○
Q93	This practice has a clear, expressable vision.	○	○	○	○	○
Q94	There is frequent and good communication throughout the practice about how the different change initiatives are going.	○	○	○	○	○
Q95	Everyone in the practice feels able to act on the practice vision.	○	○	○	○	○
Q96	The practice has experienced many past changes successes.	○	○	○	○	○
Q97	The practice appears to let setbacks and problems stop its change efforts.	○	○	○	○	○
Q98	Once this practice implements a change, the change tends to stick.	○	○	○	○	○

Notes:

Q99

TransforMED MODEL CONTENT

At this time, to what degree has this practice implemented the core components of each of the following categories of the TransforMED Model:

		Not Implemented (1)	*Partially Implemented; Rarely used (2)*	*Partially Implemented; Occasionally used (3)*	*Mostly Implemented; Often used (4)*	*Fully integrated into practice (5)*
Q100	Information Systems (EMR, CINA, Interoperability, Chronic disease management)	○	○	○	○	○

Notes:

Q101

		Not implemented (1)	Partially implemented; Rarely used (2)	Partially implemented; Occasionally used (3)	Mostly implemented; Often used (4)	Fully integrated into practice (5)
Q102	Redesigned offices (Workflow & productivity, Group visits)	○	○	○	○	○

Notes:

Q103

		Not implemented (1)	Partially implemented; Rarely used (2)	Partially implemented; Occasionally used (3)	Mostly implemented; Often used (4)	Fully integrated into practice (5)
Q104	Quality & Safety (Patient feedback, Outcomes tracking)	○	○	○	○	○

Notes:

Q105

		Not implemented (1)	Parially implemented; Rarely used (2)	Partially implemented; Occasionally used (3)	Mostly implemented; Often used (4)	Fully integrated into practice (5)
Q106	Practice Management (Disciplined financial management, Optimal coding).	○	○	○	○	○

Notes:

Q107

		Not implemented (1)	Partially implemented; Rarely used (2)	Partially implemented; Occasionally used (3)	Mostly implemented; Often used (4)	Fully integrated into practice (5)
Q108	Comprehensive Practice (Procedures, Basket of services)	○	○	○	○	○

Notes:

Q109

		Not implemented (1)	Partially implemented; Rarely used (2)	Partially implemented; Occasionally used (3)	Mostly implemented; Often used (4)	Fully integrated into practice (5)
Q110	Team Approach (Hospital, Nursing Home, NP/PA, Office teams)	○	○	○	○	○

Notes:

Q111

		Not implemented (1)	Partially implemented; Rarely used (2)	Partially implemented; Occasionally used (3)	Mostly implemented; Often used (4)	Fully integrated into practice (5)
Q112	Access to information (Website, On-Line lab results, E-communication).	○	○	○	○	○

Notes:

Q113

		Not implemented (1)	Partially implemented; Rarely used (2)	Partially implemented; Occasionally used (3)	Mostly implemented; Often used (4)	Fully integrated into practice (5)
Q114	Access to Care (Advanced scheduling, E-visits, Access to all).	○	○	○	○	○

Notes:

Q115

		Not implemented (1)	Partially implemented; Rarely used (2)	Partially implemented; Occasionally used (3)	Mostly implemented; Often used (4)	Fully integrated into practice (5)
Q116	Continuous relationship	○	○	○	○	○

Notes:

Q117

		Not implemented (1)	Partially implemented; Rarely used (2)	Partially implemented; Occasionally used (3)	Mostly implemented; Often used (4)	Fully integrated into practice (5)
Q118	Patient-Centered Care	○	○	○	○	○

Notes:

Q119

		Not implemented (1)	Partially implemented; Rarely used (2)	Partially implemented; Occasionally used (3)	Mostly implemented; Often used (4)	Fully integrated into practice (5)
Q120	Whole person orientation	○	○	○	○	○

Notes:

Q121

		Not implemented (1)	Partially implemented; Rarely used (2)	Partially implemented; Occasionally used (3)	Mostly implemented; Often used (4)	Fully integrated into practice (5)
Q122	Personal medical home	○	○	○	○	○

Notes:

Q123

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