

Online Supplementary Material

Sinsky CA, Willard-Grace R, Schutzbank AM, Sinsky TA, Margolius D, Bodenheimer T. In search of joy in practice: a report of 23 high-functioning primary care practices. *Ann Fam Med*. 2013;11(3):272-278.

<http://www.annfammed.org/content/11/3/272>

Supplemental Appendix 3. Future Research Agenda

Proactive Planned Care (previsit planning and preappointment laboratory tests)
<ul style="list-style-type: none"> • How does planned care affect clinical and financial metrics of chronic illness? • How does preappointment laboratory affect patient engagement and shared decision making? • How does preappointment laboratory affect the time a practice spends on results reporting? • How does reappointment at each visit affect patient adherence to recommended follow-up intervals? • How does planned care with preappointment laboratory testing affect patient/staff/physician satisfaction?
Team Composition
<ul style="list-style-type: none"> • What is the optimal care team? • How do staffing ratios (ie, 1 MA:MD vs 3 RN:MD) affect physician, staff, and patient satisfaction? • How does staffing stability (ie, same people every day vs different assistant daily) affect physician, staff, and patient satisfaction? • How does an MA-MD team compare with a RN-MD team in terms of task distribution, efficiency, quality, patient/staff/physician satisfaction? • How does continuity with the physician vs a larger care team affect patient/staff/physician satisfaction? • How does continuity with the physician vs a larger care team affect quality and cost outcomes? • What are the services a panel of patients requires that a single physician can be trained to provide? • How does the regional availability of associate's degree RN (ADN) training programs affect the primary care clinical assistant workforce?
Expanded Nurse/Medical Assistant Rooming Protocols
<ul style="list-style-type: none"> • How do expanded rooming protocols affect patient/staff/physician satisfaction? • What training is necessary for successful implementation of expanded rooming protocols? • How do expanded rooming protocols affect prevention and chronic illness care gaps? • How do expanded rooming protocols affect physician perception of workload and stress? • How do expanded rooming protocols affect the amount of undivided attention the physician provides to patient?
Standing Orders
<ul style="list-style-type: none"> • How do standing orders that empower team members to assume new responsibilities affect patient/staff/physician satisfaction? • How do standing orders affect the timeliness of non-visit-based care, such as telephone management? • How do standing orders affect the volume of messages (verbal, paper, or electronic) circulating in the practice?

Extended Care Team
<ul style="list-style-type: none"> • How do same-day warm handoffs (mental health worker meets patient in examination room) affect adherence to visits and quality of care? • How do pharmacists, nutritionists, and social workers on the care team affect physician/staff and patient satisfaction? • How does continuity at the level of the practice vs at the level of the personal physician affect quality, cost, and satisfaction outcomes? • How does continuity across inpatient and outpatient affect physician long-term skill retention, career satisfaction, patient satisfaction, transitions of care quality, global costs of care. • What are the implications for de-skilling when a physician does not provide hospital care?
Collaborative Documentation (Scribing) and Assistant Order Entry (AOE)
<ul style="list-style-type: none"> • How does collaborative documentation/AOE affect the length of the physician workday? • How does collaborative documentation/AOE affect the stress of the physician workday? • How does collaborative documentation/AOE affect the percent of the physician workday spent on physician level activities? • How does collaborative documentation/AOE affect physician/staff/patient satisfaction? • How does collaborative documentation/AOE affect the amount of undivided attention the physician gives to the patient? • How is staff best trained for collaborative documentation/AOE? • What are the electronic tools that facilitate or inhibit collaborative documentation/AOE? • What are the institutional and national policies that facilitate or inhibit collaborative documentation/AOE?
Standardized Prescription Renewal
<ul style="list-style-type: none"> • How many prescription renewal requests are handled each day? • How much staff and clinician time is spent on prescription renewals each day? • How does standardized annual renewal affect the volume of renewal requests? • How much time and how many touches does each prescription renewal require? • How does standardized annual renewal affect medication adherence? • How does standardized annual renewal affect time spent on renewals? • How does standardized annual renewal affect patient/staff/physician satisfaction? • How does the variation in state regulations for prescription duration (12-15 months) affect efficiency?
In-box Management and Messaging
<ul style="list-style-type: none"> • What are the most efficient and effective means of messaging? • How many and what type of messages are handled each day? • How much time is spent on messaging (verbal, paper, electronic) each day? • How much time is required to resolve an electronic message vs a verbal message? • What percentage of electronic messages are resolved on first pass to clinician? What percentage of verbal messages are resolved on first pass? • How does electronic messaging affect physician/staff/patient satisfaction? • How does verbal messaging affect physician/staff/patient satisfaction? • How does verbal messaging affect quality and timeliness of response to patient?
Co-location and Physical Space
<ul style="list-style-type: none"> • How does co-location of MA/nurse and physician affect communication between team member? • How does co-location affect timeliness of message responses to patient • How does co-location affect physician/staff/patient satisfaction? • How does the proximity of coworkers affect working relationships? • How does a dedicated scheduler co-located with the care team affect physician/staff and patient satisfaction? • What is the optimal layout of the examination room for patient-physician-nurse communication? • What is the optimal examination room layout to integrate technology into the visit while maintaining human connectedness?

- What are differences in patient and physician satisfaction when the interaction is oriented around the EHR, with the patient to the side vs oriented around the patient, with the EHR off to the side?
- How do “tap and go” or biometric computer sign in capabilities affect work flow?
- What is the optimal number, size and configuration of computers in the examination room?
- How does an open space configuration affect professional isolation and alienation?

Huddles and Team Meetings

- What work is accomplished in team meetings?
- What are the most effective frameworks (structured, semistructured, mental health worker facilitated) for team meetings?
- How do team meetings affect physician/staff/patient satisfaction?
- How do teams develop adaptive reserve and change capacity?
- What are some of the common responses to change?
- How to help move physicians and staff from “resistant victim” mode to “engaged problem solving” mode during a change event?
- What is the impact of huddles and meetings on team cohesion?

Work Flow Mapping and Quality Improvement Efforts

- What tools are most effective in helping teams analyze and improve their work flow?
- How does training staff in the language and techniques of quality improvement affect staff satisfaction? Problem-solving skills?

AOE = assistant order entry; HER = electronic health record; MA = medical assistant; MD = medical doctor; RN = registered nurse.