

**Workflow and Electronic Health Records in Small Medical Practices
QUESTIONNAIRE**

1. What activities do you perform in relation to healthcare delivery to the patient? Give a brief listing.

2. What activities do you perform when a new patient comes in?

3. What activities do you perform when a current patient comes in?

4. How do you schedule an appointment for a patient?

5. How do you inform the patient of any changes in their appointment?

6. How do you convey test results or any matters of urgency to the patient?

7. How would a patient change or cancel an appointment with your office?

8. How do you reschedule patient appointments?

9. How do you maintain your appointment schedules (e.g., paper calendar)?

10. What type of encounter forms would you normally use at each visit by a patient (e.g., registration forms, billing forms, consent forms)?

11. Where do you enter the information received from phone calls?

12. How do you record reminders about each patient's annual checkups, annual tests, or follow-ups?

13. Do you inform the patient and/or remind them about an upcoming appointment or tests?

14. How do you notify or inform the patient once the appointment is scheduled (for example, reminder card or phone call)?

15. How are you informed each time a patient is hospitalized?

16. How do you update hospitalization information in the charts for the patient?

17. How and when do you update a change to the previous medication after a patient has been hospitalized?

18. How do you receive reports from the labs (e.g., Email, phone, or fax)?

19. Please explain the prescription process.

20. Describe in detail your lab protocol.

21. Please explain your procedure when making a referral?

22. How is external information from another office transferred to you (e.g., collected, mail, fax, email, oral/phone, etc.)?

23. How is the physician informed about this transferred information?

24. How and when do you sort and/or store this information?

25. Describe the various documents you produce (e.g., back-to-work, leave certificate, school physicals, referral forms)?

26. Which of your tasks seem to be the most time-consuming or inefficient?

27. Any other comments.

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