

## AHRQ's Primary Care Practice Facilitation Forum

# New & Noteworthy

### PCMH Resource Center

The primary care medical home, also referred to as the patient centered medical home (PCMH), advanced primary care, and the healthcare home, is a promising model for transforming the organization and delivery of primary care.

We provide implementers, decisionmakers, and researchers with access to evidence-based resources about the medical home and its potential to transform primary care and improve the quality, safety, efficiency, and effectiveness of U.S. health care.

Please visit us at [pcmh.ahrq.gov](http://pcmh.ahrq.gov).

*This electronic newsletter continues our efforts toward building a learning network for individuals with an interest in practice facilitation. We will use this listserv to share questions and answers submitted by learning forum members, as well as resources, research articles, and events of interest to the community.*

### Key Concepts in Practice Facilitation

#### Collecting Performance Data with Chart Audits

##### *Auditing Patient Charts to Obtain Valuable Data for Improving Practice Performance*

One of the most important functions of a facilitator is to help practices obtain, present, and interpret data in a meaningful and compelling way and translate the findings into action. Facilitators frequently spend most of their time with a practice creating systems, such as the use of audits and feedback, to access reliable data and building capacity in the practice to use these data in their improvement work.

It is important that you feel comfortable collecting, analyzing, and reporting data. Once data have been collected, they will need to be cleaned, analyzed, and presented to both the practice team involved with the project and to practice staff, providers, and leadership. The use of data and feedback systems allows practices to see improvements during an intervention, make adjustments, and stay engaged.

Depending on the practice, you may gather data by hand or electronically from an electronic health record (EHR) or registry. Regardless of the method, you will need to ensure the data are secure at all times. All data collected from a practice are highly sensitive so, as a rule, never take identified patient data offsite from a practice, and use a key code to connect personal health information (PHI) to de-identified data.

You will also need to collect data multiple times so the practice can track its progress, with the frequency of performance audits dependent on the goal of the audit. For the initial performance audit, it is most effective to conduct an audit of the previous 12 months and organize these data by quarter to show fluctuations in performance over the time period. During active improvement work, monthly performance audits of patients can help a practice monitor its progress, or lack thereof, toward improvement goals. Daily performance audits may be needed to assess how effective a modification is in improving a targeted performance metric, and for deciding if a modification is ready for wider spread in the practice or organization. And for a practice that has achieved an improvement goal, quarterly audits can be used to help them ensure that the improved performance is maintained.

For more information on collecting performance data with chart audits, see [Module 8](#) of *The Practice Facilitation Handbook: Training Modules for New Facilitators and Their Trainers*. You can download a [PDF copy of the entire handbook](#) free of charge at the PCPF Resources page of AHRQ's **PCMH Resource Center** ([www.pcmh.ahrq.gov](http://www.pcmh.ahrq.gov)).

### Related Resource

The Agency for Healthcare Research and Quality (AHRQ) has released a [Health Information Security and Privacy Collaboration Toolkit](#) to provide guidance when conducting organization-level assessments of business practices, policies, and state laws that govern the privacy and security of health information

exchange (HIE). All materials, which includes scenario guides, data collection templates, and more, and overviews of each toolkit component can be found on the [AHRQ website](#).

The toolkit was developed as part of an AHRQ and Office of the National Coordinator for Health Information Technology joint-funded Health Information Security and Privacy Collaboration (HISPC) project.

For more information on the HISPC project, [click here](#).

## Related Resource

AHRQ is testing a primary care version of its well-regarded TeamSTEPPS® program, an evidence-based teamwork system aimed at optimizing patient outcomes by improving communication and teamwork skills among health care professionals. It includes a comprehensive set of ready-to-use materials and a training curriculum to successfully integrate teamwork principles into any health care system.

The [Primary Care version of TeamSTEPPS](#) adapts the core concepts of the TeamSTEPPS program to reflect the environment of primary care office-based teams. The examples, discussions, and exercises are tailored to the primary care environment. The modules may undergo refinement during testing but still serve as a good source for offices that want to apply TeamSTEPPS principles to their practice.

You can learn more about the program and obtain all necessary materials, including an instructor's guide, objectives for training, and tools to help primary care teams think about how to best work together, by visiting the [AHRQ website](#).

## Upcoming Event

*Training practice facilitators to help primary care practices improve use of health information technology*

**Register Now! Tuesday, October 21 from 3:00 – 4:30 p.m. ET**

This is the second in a series of webinars designed to share AHRQ's development of tools and resources for training primary care practice facilitators (PFs). This session focuses on how PFs can help small and medium-sized primary care practices enhance their use of health information technology (HIT) for QI and patient-centered medical home transformation. The webinar will review emerging best practices in training PFs to support HIT enhancement in practices, and introduce the audience to resources being developed for the practice facilitation model curriculum. Speakers are experts in PF, PF training and HIT optimization in small practices, and will include:

- Grace Floutsis, MD, Chief Medical Officer at Community Health Alliance of Pasadena
- Allyson Gottsman, Program Manager, Colorado Health Extension Program
- Kari Loken, Program Manager, Colorado HealthTeamWorks
- Mary McCaskill, HIT Manager, North Carolina Area Health Education Center

To register, please click [here](#).

## Upcoming Event

*The Second Annual Conference on Academic Detailing*

**November 13-14 in Boston, MA**

The second in this conference series provides participants with a two day interactive discussion of implementing educational outreach to improve patient care and outcomes. Topics include case studies of academic detailing initiatives, key public health challenges and the economics of academic detailing.

The conference is sponsored by Brigham and Women's Hospital, Harvard Medical School and the National Resource Center for Academic Detailing (NaRCAD). The conference series is supported by a grant from AHRQ. There is no registration fee.

More information can be found at the [NaRCAD website](#).

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