



Practice Management Curriculum

Locum Evaluation Checklist

Scope and Style of Practice

- What are the patient demographics (e.g., pediatrics, women's health, geriatrics, adolescents)?
- Does the practice have a specialty interest or special needs population?
- Does the physician do deliveries, or shared care obstetrics (prenatal care to 28 weeks), or perform minor surgeries?
- If you are expected to perform the same procedures, are you competent and comfortable in delivering these services? If not, has the host made arrangements for other colleagues to cover these tasks during the term of the locum?
- A list of procedures should be clarified in the contract.
- What are the regular office hours? Can you modify the office schedule if necessary?
- What on-call obligations are you expected to assume? Are there additional obligations related to the group's after-hours clinic, hospital, nursing home, house calls or emergency department?
- Do you have the option of not filling any of these obligations?
- Will the physician's trusted colleagues be readily available to assist you in an emergency?
- Does the host doctor follow current practice guidelines and evidence-based medicine?
- Does the doctor follow current guidelines for prescribing antibiotic, narcotic and anxiolytic medications?
- Does the host doctor have patients on long-term narcotics for non-malignant pain, and, if so, have these patients signed a contract?
- What are the office policies for phone-call prescription renewals and missed appointments?
- How does the doctor handle requests for sick notes?
- Are practice policies (e.g., missed appointments, phone consultations) clearly posted in the office? Has the doctor provided each patient with a patient information handout that explains the practice's policies? Do staff members enforce the policies?
- Is the office clean and comfortable, with up-to-date equipment?

Appointments

- What is the average number of patients seen per day?
- Does the reception staff triage appointments?
- Is the reason for the patient visit recorded on the appointment schedule?
- Does the host doctor use 10-minute or 15-minute time slots for average patient visits?
- Are two or three time slots reserved for check-ups and counselling?
- How many periodic health examinations are scheduled each day? How much time is allocated for these appointments? When during the day are they scheduled?
- When are procedures done? How much time is allocated for procedures?
- How does the doctor fit same-day call-ins into the schedule?
- How many dedicated slots are allocated and protected for same-day call-ins?
- Does the doctor have clear guidelines for booking double appointments?
- Are there a reasonable number of time slots over the next two weeks for new bookings?
- Can you modify the appointment schedule if necessary?

Medical Charts

- Are the medical records comprehensive, legible and well organized?
- Does the physician dictate or write progress notes? Do the progress notes follow the SOAP (Symptoms, Observations, Assessment and Plan) format?
- Does the physician keep up-to-date cumulative patient profiles (CPPs), and such records as cumulative medication sheets, diabetic, INR and lipid flow sheets?
- Are allergy and immunization records clearly marked?
- Do the records indicate compliance with evidence-based medicine and practice guidelines for preventative care and screening?
- Do the records indicate the physician's prescribing habits for controlled drugs, anxiolytics and antibiotics?
- Do the records raise any concerns regarding medical competence?
- Do the medical charts have year labels that will help you to determine the number of patients who have been seen within the past two years?
- If EMR, are all of the above requirements met and, if required, will you be orientated to the EMR system in advance?

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Getting Ready for the Locum

- Have you confirmed all of your office, hospital, outpatient, call and other responsibilities?
- Have your hospital privileges been secured?
- Will you be provided with experienced office staff?
- Do you have contact information for call group members, consultants, labs, diagnostic services, pharmacies and other important referrals?
- Have you received a hand-over list, identifying special needs patients?
- Have you verified that the host doctor will assume medical legal responsibility after your term has ended for all pending investigations that you initiated?
- Have you met the key staff members and physicians at the hospital?
- Have you arranged for parking or transportation?
- Will the host doctor arrange for your orientation to the community?
- Do you have a place to stay?

The Locum Contract

- Have both parties agreed to and signed a locum contract that addresses all relevant issues?