



Practice Management Curriculum

Public Access Area Checklist

- Is the office building or clinic easily accessible by car and public transportation?
- Is adequate parking available on-site or nearby for patients, staff, and physicians?
- Can physically challenged patients be dropped off at the front door?
- Are the elevators, halls, washrooms, offices as well as the building wheelchair accessible?
- Can a stretcher be accommodated in the elevators, the offices, and all public areas?
- Is the office building clean and well maintained?
- What allied health services are on-site?
- Is there a coffee shop on-site or nearby?

Waiting Room Checklist

- Is the waiting room comfortable and well maintained?
- How many patients and their companions must be accommodated at any one time?
- Does the entrance door open without risk of injury to people who are using the coat and shoe racks?
- Are there adequate and accessible racks for coats and shoes?
- Are hand sanitizers and masks (when appropriate) conveniently provided for everyone to use upon arrival?
- Are there sufficient comfortable chairs, appropriately spaced, so no one's personal space is compromised and no one has to stand?
- Is there dedicated space for patients who require wheelchairs or walkers?
- Is there an unobstructed path to the reception window?
- Is the room painted and decorated in calming colours?
- Is there a sound system for music or white noise to ensure conversations from the clinical side of the office are not overheard in the waiting room?
- Should a TV be provided with channels and volume controlled by staff?
- Is the reception window positioned away from the seating area so that confidentiality can be maintained as new patients register?
- Can staff close reception windows to maintain privacy for their phone calls, conversations, and work?
- Are current magazines available?
- Is there a need for a dedicated children's play area?
- Is a washroom available for patients?

Reception Area Checklist

- Is the reception area inviting for patients?
- Is there adequate room for staff members to receive and discharge patients?
- Can privacy be respected when patients register, ask questions, or pay for uninsured services?
- Is there sufficient privacy for the reception staff?
- Is there adequate room for employees to get up and move around without disturbing each other?
- Are the desks and working areas ergonomically designed to maximize function and minimize repetitive strain injury (RSI)?
- Have you provided your staff with adjustable, ergonomic chairs?
- Are phones, computers and communication systems designed to maximize use and minimize RSI?
- Are photocopiers, scanners, etc. located for timely, efficient and effective use?
- Does the area have excellent lighting?
- Is there a sound system for music or white noise to ensure conversations from the clinical side of the office are not overheard in the waiting room?

Administrative and Clerical Areas

- Are there designated areas away from the reception area where staff can do administrative work?
- If the office is open concept, can privacy issues be respected?
- Do the file storage set up and retrieval protocols meet privacy standards?
- If paper files are used, are medical records within easy reach?
- Is there adequate space for an EMR?
- Is adequate accessible storage available for office supplies?
- Is there adequate storage to archive paper charts?

Common Areas Checklist

- Are inner office hallways wide enough to accommodate wheelchairs?

Examination and Procedure Room Recommendations

- Does the room also accommodate an examination table, sink, desk, equipment, supplies as well as the patient and at least one companion, along with staff, technicians and physicians who would likely be in the room at the same time?
- Are there enough chairs for the patient and a companion as well as the physician?
- Are all rooms in the clinic multi-functional so that there's no need to wait for a particular room to be available?
- Are there adequate and warm gowns as well as a place to hang clothes?
- Are there effective blinds or curtains to guarantee privacy?

- Is the door to the exam room placed and hinged so that patient privacy is respected when the door is opened?
- Is the room well ventilated with climate control?
- Is the exam room soundproof, including the ceiling?
- Is there natural light? Dedicate inside rooms for radiological or ophthalmological procedures that require darkness so you can take maximum advantage of natural light for other rooms.
- Are procedural lights flexible (and portable, if required) and placed for maximum illumination?
- Do power and service supplies meet your technical requirements now and for the future?
- Are the examination and procedure tables and chairs placed so that both patient and physician can access them comfortably? Consider tables with caster rollers that can be locked if you do procedures that require access from both sides.
- Is equipment within easy reach of the physician and staff? (Avoid reaching over or around the patient in any way.)
- Are waste and sharps disposal containers close by and safely out of easy reach of children?
- Is the sink conveniently positioned for ready access by the physician?
- Is the physician work area positioned so it is NOT in the corner farthest from the door?
- Is the physician's chair positioned so that he/she can easily pivot from the examination area to the sink, medical waste disposal, chart completion area, computer screen, phone/intercom and any requisitions or patient handouts.
- Is the room equipped with an EMR? If not, can it accommodate one in the future?

Private Areas for Physicians and Staff Checklist

- Is there a dedicated staff lounge or kitchen area away from patient contact areas so that all staff members can take lunch and breaks there?
- Are there counter and sink areas that are dedicated for cleaning and sterilizing equipment (different from the ones staff members use for food preparation)?
- Is there a private washroom for staff?
- Are there secure coat and storage areas for all staff members?
- Does each physician require a personal office or are physicians willing to share a dedicated area where they will have their own personal workstation?

Action Plan

- Evaluate the offices and clinics where you presently work as case examples.
- Ask physicians and staff what they like and what they would change or improve.
- Make notes and drawings of set ups you like.