

# *Equipping the Trainers: Developing A Comprehensive Practice Management Manual*

---

CENTRAL VIRGINIA HEALTH SERVICES

CHC LEADERSHIP INSTITUTE LEARNING PROGRAM 2017-18

CAPSTONE TEACHBACK: JUNE 13, 2018

# 1. Team

---

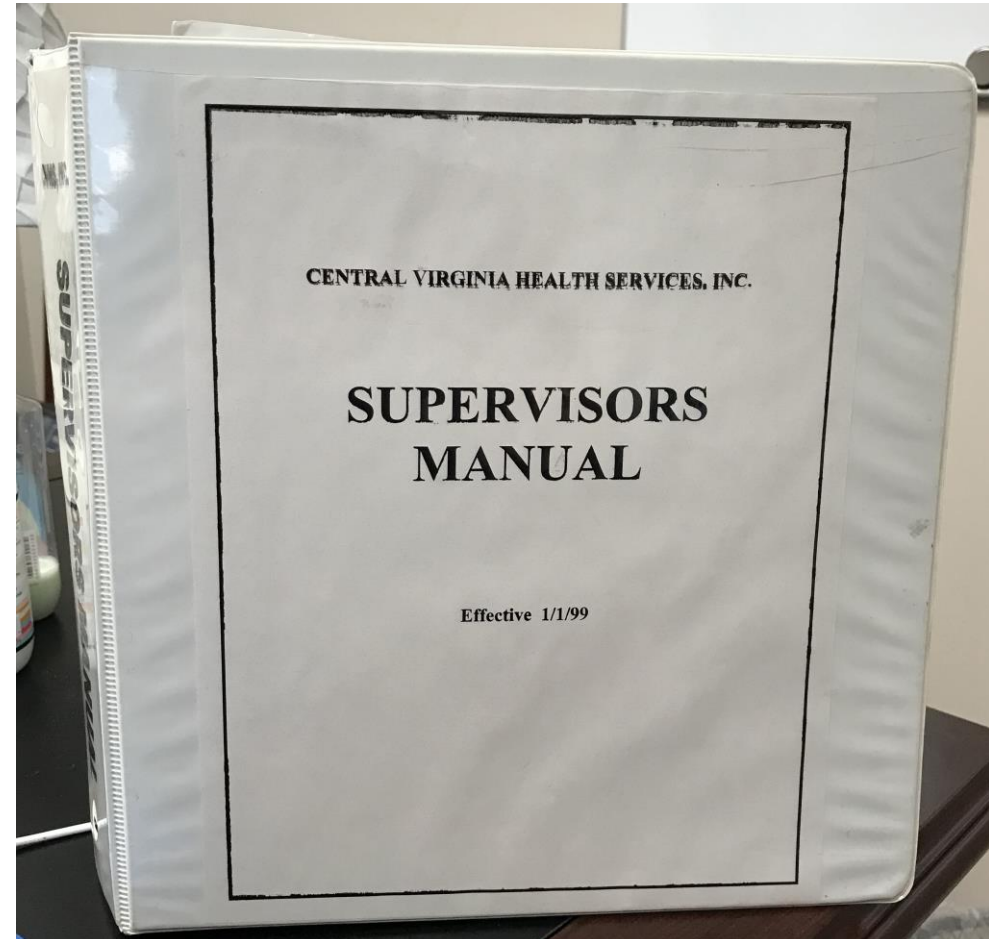
- **Leslie Hanley**
  - Pharmacist, Central Virginia Community Health Center
- **Lori Kelly**
  - Administrative Services Manager, Central Virginia Health Services, Inc.
- **Amanda Morgan**
  - Director of Marketing and Government Affairs, Central Virginia Health Services, Inc.
- **CW Whindleton**
  - Financial Accounting Manager, Central Virginia Health Services, Inc.
- **Chasity Withrow**
  - Practice Manager, Community Health Center of Rappahannock Region

All involved parties have no conflict of interest.

## 2. Focus

---

The focus of this project was to create a Practice Manager Manual as a tool to assist individuals in becoming successful managers and to reorient current managers with best practices.

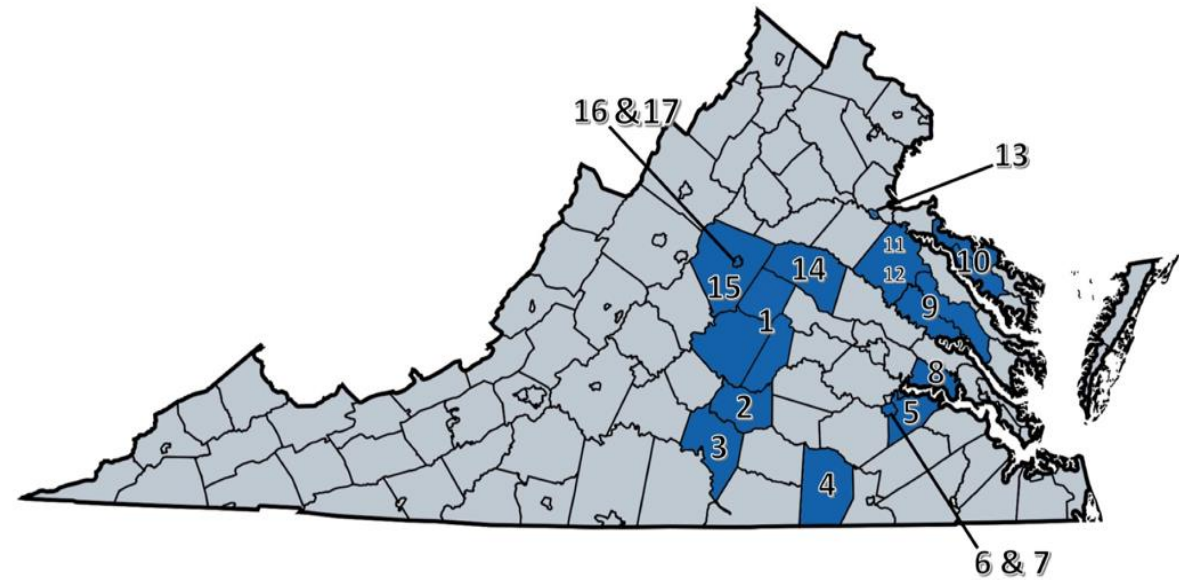


# 3. Need

---

CVHS realized that there was:

- No updated manager's manual readily available
- Little standardization among sites
- Redundant policies and procedures for everyday operations
- A need for deeper understanding of evolving requirements
- A need to equip managers with adequate tools as a way to empower them to successfully lead the site



## 4. Objectives

---

- Create Practice Manager Manual
  - Reduce the amount of time it takes to find important forms required for daily activities
  - Increase the amount of time available to handle other workplace responsibilities by improving workflow
  - Standardize forms sent to other departments regarding employees, deposits, etc.
- Compliance with external agencies
- Developing/integrating a structured workflow to ensure compliance of UDS measures

## 5. Assets

---

- Collective knowledge of our team
- Current practice managers/office managers
- Documentation from outdated supervisors manual
- SharePoint/Corporate Drive
- Admin Team



## 6. Action Strategies

---

- Survey
  - Current office and practice managers
  - Before and after implementation
- Utilize Cloud based system
  - Make all forms into a format that can be filled in directly
  - Create one electronic master document
- Go LIVE with manual and then re-evaluate training with new hires and practice managers
  - Training staff using the new manual

# 7. Team Development

---

- CHC Leadership sessions
- Utilization of internal leadership meetings
- In person, phone, and web group meetings for team evaluation of current manual and creation of new Practice Manager Manual
- The diversity of the group allowed us to recognize gaps due to changes in processes both administratively and clinically





## 8. Testing & Refinement

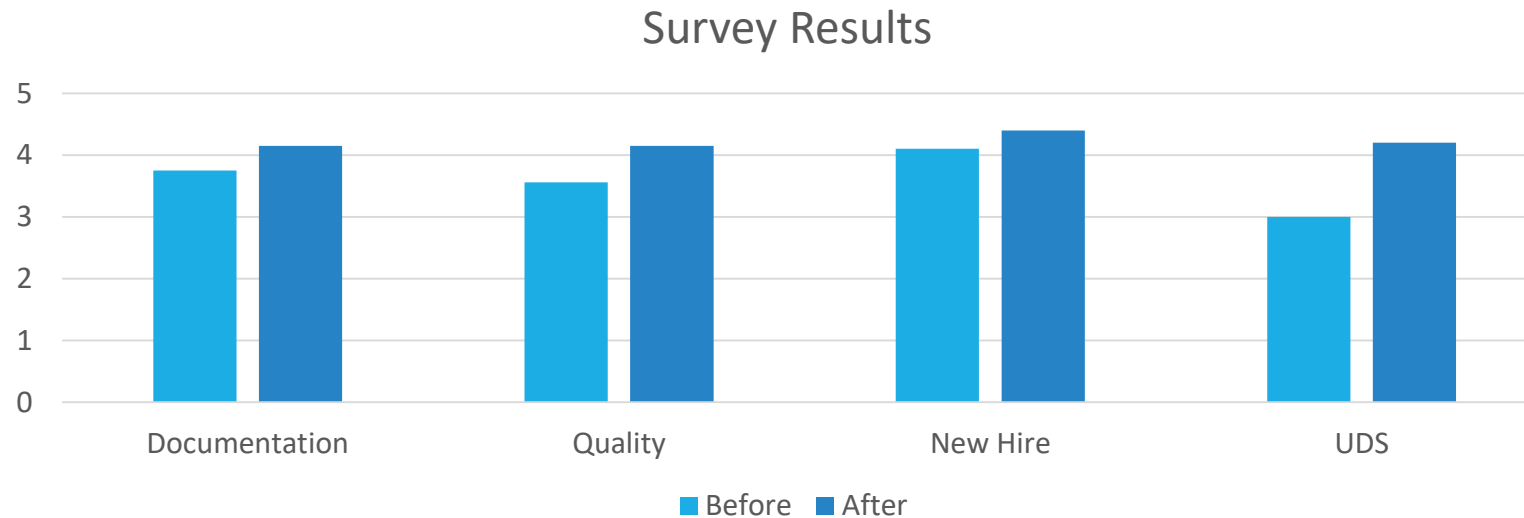
---

- Initial survey of documentation for managers
- Initial Practice Manager Manual was presented at a mid-managers meeting
- Gather feedback from managers and make necessary changes
- Evaluate using surveys or questionnaires on the resources available for training manual once implemented

# 9. Results to Date

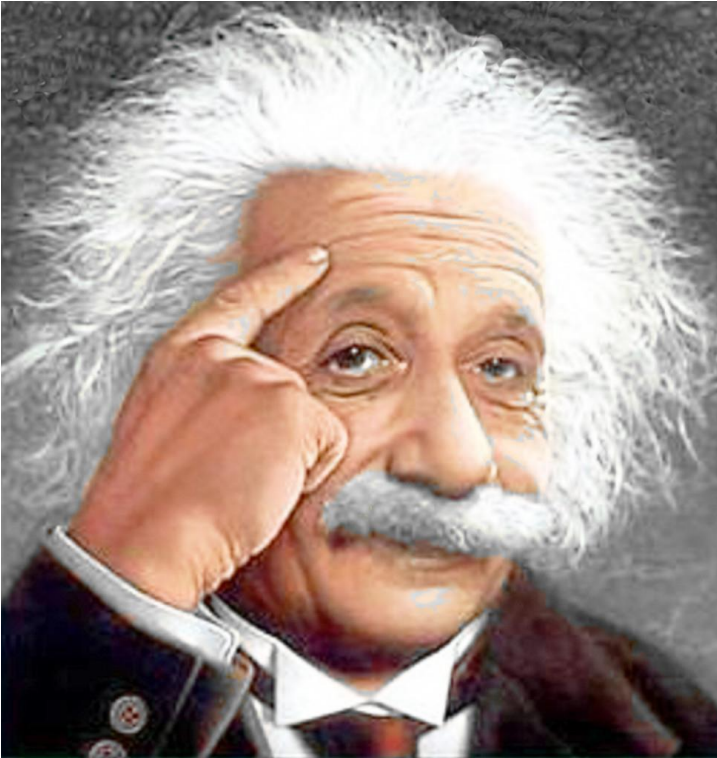
---

- Updated Practice Manager Manual
- Streamlined New Hire Process
- Digitized and updated documentation in a central location
- Put manual into practice
- 100% of respondents reported improved documentation



# 10. Lessons Learned

---



- From the survey:
  - Most managers do not know about UDS measures, why or how it needs to be integrated into daily operations, and how to collect data
  - Not many managers were satisfied with the previous documentation (quality or accuracy) or where to go to find it
  - Some managers were not satisfied with the overall training that they were provided
- The benefit of multi-disciplinary collaboration
- Efficiency comes with organization
- You can't expect different results without doing something different

*Questions?*