

Family Medicine Residency
Practice Management Rotation

Rotation Goal

The overall educational goal of the Practice Management curriculum is to provide residents with the skills and knowledge necessary to lead and continuously improve all elements of healthcare delivery, including compliance with external regulatory agencies and accreditation requirements.

The rotation will combine two two-week blocks in the PGY-1 and PGY-3 years, monthly noon conferences, two four-hour mini-seminars and additional longitudinal experiences.

The PGY-1 experience will include detailed instruction on coding and documentation, HIPPA, and CLIA compliance. The experience will also include four days at a rural model practice. During the resident’s first year, he/she will have 56 hours of practice management instruction.

The PGY-2 experience will include “building” a mock practice. This experience will involve selecting a practice model, hiring a PGY-1 employee and PGY-3 consultant, selecting a practice location, purchasing equipment and supplies, developing practice manuals, hiring staff, and marketing the practice. Noon conferences, mini-seminars, and individual meetings will guide the resident through this process. The second year resident will have an optional half-day to explore an office practice of his/her choice. The PGY-2 experience will include 16-24 hours of practice management instruction.

The PGY-3 experience will include the completion of an ABFM PPM, assisting the PGY-1 with the mock practice, and serving as Doctor of the Day for two ½ days, and finalizing practice location requirements. The third year practice management experience will include at least 48 hours.

The longitudinal component will include quarterly advisor/advisee meetings during which residents will review individual, class, and group productivity reports and quarterly noon conferences that include community speakers. The longitudinal component will involve at a minimum of 21 hours.

Supervision

Residents will be supervised by attendings, office staff, and community preceptors.

Rotation Objectives

By the end of the Practice Management rotation, PGY-1 residents are expected to expand and cultivate skills and knowledge learned during previous training and to achieve the following objectives based on the six general competencies. The resident should exhibit an increasing level of responsibility and independency as he or she progresses throughout the year.

Competency	Required Skill(s)	Teaching Method(s)	Formative Evaluation Method(s)	Frequency of Evaluation
Patient Care	SPECIALTY SPECIFIC OBJECTIVES			
	Adequately document the patient encounter and appropriately bill for medically- necessary services	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly

	Advocate for the patient's welfare while balancing the business realities of practice management	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Develop an understanding of how external quality reviews mandate an effective participation in outcomes research	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Explore practice models that enhance patient access to care and collaboration with other health professionals	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
Medical Knowledge	SPECIALTY SPECIFIC OBJECTIVES			
	Develop the knowledge to effectively lead and improve health care delivery and develop skills such as organization, administration, communication, marketing, and patient care.	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Demonstrate knowledge of the following: <ul style="list-style-type: none"> • Practice opportunities • Practice facilities • Office organization • Practice operations • Office management • Medical records • Staff and personnel policies • Legal issues • Hospital responsibilities • Marketing • Resources such as practice management consultants, accountants, lawyers, bankers, and marketing consultants 	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Develop leadership skills that will enable them to effectively provide care in a wide variety of settings	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Critically evaluate practice models using the skills acquired during the practice management curriculum	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
Practice Based	SPECIALTY SPECIFIC OBJECTIVES			

Learning and Improvement	See General Family Medicine Objectives for a comprehensive list.			
	Systematically analyze practice, using quality improvement methods, and implement changes with the goal of practice improvement	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Identify strengths, deficiencies and limits in one's knowledge and expertise; set learning and improvement goals; and identify and perform appropriate learning activities	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
Interpersonal and Communication Skills	SPECIALTY SPECIFIC OBJECTIVES			
	See General Family Medicine Objectives for a comprehensive list.			
	Communicate effectively with patients and families across a broad range of socioeconomic and cultural backgrounds; with physicians, other health professionals, and health related agencies; and with office staff, business consultants, and professional associates	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Work effectively as a member of leader of a health care team or other professional group	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Maintain comprehensive, timely, and legible medical records	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
Professionalism	SPECIALTY SPECIFIC OBJECTIVES			
	See General Family Medicine Objectives for a comprehensive list.			
	Develop the skills to prudently select advisors, vendors, and professional associates that protect and respect the privacy of all patients, and who adhere to high ethical standards.	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Behave in a professional manner when interacting with patients or other health care providers (i.e., integrity, respect, accountability, punctual)	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
Systems-Based Practice	SPECIALTY SPECIFIC OBJECTIVES			
	See General Family Medicine Objectives for a comprehensive list.			

	Incorporate considerations of cost awareness and risk-benefit analysis in patient care	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Advocate for quality patient care and optimal patient care systems while balancing the business realities of practice management	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Work in interprofessional teams to enhance patient safety and improve patient care quality	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Participate in identifying systems errors and in implementing potential systems solutions	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly

By the end of the Practice Management rotation, PGY-2 residents are expected to expand and cultivate skills and knowledge learned during previous training and to achieve the following objectives based on the six general competencies. The resident should exhibit an increasing level of responsibility and independency as he or she progresses throughout the year.

Competency	Required Skill(s)	Teaching Method(s)	Formative Evaluation Method(s)	Frequency of Evaluation
Patient Care	SPECIALTY SPECIFIC OBJECTIVES			
	Adequately document the patient encounter and appropriately bill for medically- necessary services	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Advocate for the patient's welfare while balancing the business realities of practice management	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Develop an understanding of how external quality reviews mandate an effective participation in outcomes research	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Explore practice models that enhance patient access to care and collaboration with other health professionals	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
Medical Knowledge	SPECIALTY SPECIFIC OBJECTIVES			

	Develop the knowledge to effectively lead and improve health care delivery and develop skills such as organization, administration, communication, marketing, and patient care.	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Demonstrate knowledge of the following: <ul style="list-style-type: none"> • Practice opportunities • Practice facilities • Office organization • Practice operations • Office management • Medical records • Staff and personnel policies • Legal issues • Hospital responsibilities • Marketing • Resources such as practice management consultants, accountants, lawyers, bankers, and marketing consultants 	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Develop leadership skills that will enable them to effectively provide care in a wide variety of settings	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Critically evaluate practice models using the skills acquired during the practice management curriculum	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
Practice Based Learning and Improvement	SPECIALTY SPECIFIC OBJECTIVES			
	See General Family Medicine Objectives for a comprehensive list.			
	Systematically analyze practice, using quality improvement methods, and implement changes with the goal of practice improvement	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Identify strengths, deficiencies and limits in one's knowledge and expertise; set learning and improvement goals; and identify and perform appropriate learning activities	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
Interpersonal and Communication	SPECIALTY SPECIFIC OBJECTIVES			
	See General Family Medicine Objectives for a			

Skills	comprehensive list.			
	Communicate effectively with patients and families across a broad range of socioeconomic and cultural backgrounds; with physicians, other health professionals, and health related agencies; and with office staff, business consultants, and professional associates	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Work effectively as a member of leader of a health care team or other professional group	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Maintain comprehensive, timely, and legible medical records	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
Professionalism	SPECIALTY SPECIFIC OBJECTIVES			
	See General Family Medicine Objectives for a comprehensive list.			
	Develop the skills to prudently select advisors, vendors, and professional associates that protect and respect the privacy of all patients, and who adhere to high ethical standards.	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Behave in a professional manner when interacting with patients or other health care providers (i.e., integrity, respect, accountability, punctual)	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
Systems-Based Practice	SPECIALTY SPECIFIC OBJECTIVES			
	See General Family Medicine Objectives for a comprehensive list.			
	Incorporate considerations of cost awareness and risk-benefit analysis in patient care	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Advocate for quality patient care and optimal patient care systems while balancing the business realities of practice management	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Work in interprofessional teams to enhance patient safety and improve patient care quality	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly

	Participate in identifying systems errors and in implementing potential systems solutions	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
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By the end of the Practice Management rotation, PGY-3 residents are expected to expand and cultivate skills and knowledge learned during previous training and to achieve the following objectives based on the six general competencies. The resident should exhibit an increasing level of responsibility and independency as he or she progresses throughout the year.

Competency	Required Skill(s)	Teaching Method(s)	Formative Evaluation Method(s)	Frequency of Evaluation
Patient Care	SPECIALTY SPECIFIC OBJECTIVES			
	Adequately document the patient encounter and appropriately bill for medically- necessary services	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Advocate for the patient’s welfare while balancing the business realities of practice management	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Develop an understanding of how external quality reviews mandate an effective participation in outcomes research	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Explore practice models that enhance patient access to care and collaboration with other health professionals	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
Medical Knowledge	SPECIALTY SPECIFIC OBJECTIVES			
	Develop the knowledge to effectively lead and improve health care delivery and develop skills such as organization, administration, communication, marketing, and patient care.	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Demonstrate knowledge of the following: <ul style="list-style-type: none"> • Practice opportunities • Practice facilities • Office organization • Practice operations • Office management • Medical records 	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly

	<ul style="list-style-type: none"> • Staff and personnel policies • Legal issues • Hospital responsibilities • Marketing • Resources such as practice management consultants, accountants, lawyers, bankers, and marketing consultants 			
	Develop leadership skills that will enable them to effectively provide care in a wide variety of settings	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Critically evaluate practice models using the skills acquired during the practice management curriculum	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
Practice Based Learning and Improvement	SPECIALTY SPECIFIC OBJECTIVES			
	See General Family Medicine Objectives for a comprehensive list.			
	Systematically analyze practice, using quality improvement methods, and implement changes with the goal of practice improvement	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Identify strengths, deficiencies and limits in one's knowledge and expertise; set learning and improvement goals; and identify and perform appropriate learning activities	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
Interpersonal and Communication Skills	SPECIALTY SPECIFIC OBJECTIVES			
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	Communicate effectively with patients and families across a broad range of socioeconomic and cultural backgrounds; with physicians, other health professionals, and health related agencies; and with office staff, business consultants, and professional associates	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Work effectively as a member of leader of a health care team or other professional group	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Maintain comprehensive, timely, and legible medical records	ABIM PPM Self Directed Learning	Direct Feedback Global Evaluation	Daily Monthly

		One on One Sessions	360 Degree Evaluation	Monthly
Professionalism	SPECIALTY SPECIFIC OBJECTIVES			
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	Develop the skills to prudently select advisors, vendors, and professional associates that protect and respect the privacy of all patients, and who adhere to high ethical standards.	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
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	Advocate for quality patient care and optimal patient care systems while balancing the business realities of practice management	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Work in interprofessional teams to enhance patient safety and improve patient care quality	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly
	Participate in identifying systems errors and in implementing potential systems solutions	ABIM PPM Self Directed Learning One on One Sessions	Direct Feedback Global Evaluation 360 Degree Evaluation	Daily Monthly Monthly

Educational Resources

1. www.theabfm.org
2. Residency to reality: practice management tools: American Academy of Family Physicians
3. On Your Own, Starting a Medical Practice from the Ground Up: American Academy of Family Physicians
4. Giovino, J., 14 Alternative Practice Styles, Family Practice Management, February 2001
5. Moore, K., Productivity Primer, Family Practice Management, May 2002