

Organizational Health Assessment Tool - Simplified

John Lynch & Associates' Organizational Health Assessment Tool is a brief series of questions aimed at assisting a healthcare executive in evaluating the overall health of their organization. This tool is a condensed version of John Lynch & Associates' holistic Organizational Evaluation Process aimed at identifying areas of improvement for a healthcare organization.

This brief questionnaire focuses on four main areas to examine and assess an organization's overall performance; Customer Engagement & Satisfaction, Clinical Operations, Finance, and Risk & Compliance. For each question, please choose the answer that best fits your organization's current state.

Customer Engagement & Satisfaction

How would you describe your organization's approach for capturing Patient Satisfaction information?

- A. We do not utilize any tool, process, or software to collect Patient Satisfaction information.
- B. We use an organizationally created tool or process to collect this information (patient survey, etc.).
- C. We utilize a third-party tool or program to collect this information. The results are reviewed occasionally.
- D. We utilize a third-party tool or program to collect this information. The results are reviewed regularly by Clinic Leadership.
- E. We utilize a third-party tool or program to collect this information. The results are reviewed regularly by a group or committee assigned specifically to track results and make changes based upon the information.

How would you describe your organization's approach to improving the overall patient experience?

- A. We do not have a process in place to improve the overall patient experience.
- B. Each clinical site is individually responsible for improving the patient experience.
- C. We have a group or committee that meets occasionally to discuss improving patient experience.
- D. We have a group or committee that meets regularly to discuss improving patient experience.
- E. We have a group or committee that meets regularly to review data from our patient satisfaction tool. The committee is responsible for translating that data into actionable deliverables to improve patient satisfaction.

Does your organization have an avenue for employees at all levels (Physicians, Support Staff, Administrative, etc.) to provide feedback to leadership?

- A. No, our organization does not have a mechanism for internal customer feedback.
- B. Yes, our organization's employees can provide feedback through their chain of command (Medical Director, Manager, Site Administrator, etc.).
- C. Yes, our organization utilizes employee forums or online survey tools to periodically provide feedback.
- D. Yes, our organization has a group or committee responsible for collecting internal customer feedback.
- E. Yes, our organization utilizes a dedicated tool, email address, or phone number allowing staff to provide feedback at any time.

Clinical Operations

Does your organization regularly review physicians' and support services' staff workflows for accuracy and efficiency?

- A. No, our organization does not have a mechanism for measuring and reviewing staff workflow.
- B. No, our organization only reviews either accuracy or efficiency but not both.
- C. Yes, our organization periodically reviews staff workflow to check for accuracy in documentation and efficiency of workflow.
- D. Yes, it is the responsibility of a single person, group, or committee to regularly review staff workflow and documentation.
- E. Yes, our organization utilizes a standardized tool to regularly review staff workflow, identify areas for improvement, and provide feedback to staff.

How would you describe your organization's approach to ensuring patient safety in your clinic locations?

- A. We do not have a codified approach to ensuring patient safety in our clinic locations.
- B. We have standardized policies and procedures dealing with ensuring patient safety, however, review and reporting of identified issues is not done regularly.
- C. It is the responsibility of the clinic site administrator to ensure overall patient safety and report identified issues to Leadership.
- D. We have a group or committee that is responsible for regularly assessing clinic site locations to proactively identify potential patient safety issues.
- E. We regularly train all clinic staff personnel in ways and methods to ensure overall patient safety. Identified issues are reported immediately and a root cause analysis is conducted.

Does your organization regularly track and report Clinical Quality Metrics/Outcomes?

- A. No, we do not have a mechanism or procedure for regularly tracking or reporting measures.
- B. Our organization only tracks internally defined measures or outcomes.
- C. Our organization only tracks and reports on measures or outcomes assigned to us by a Health Plan.
- D. Our organization tracks and reports both Health Plan and internally defined measures and outcomes.
- E. Our organization tracks internally defined measures as well as reports Health Plan measures and outcomes, which are tied to shared savings or per member per month contracts.

Finance

How would you characterize how your organization tracks overall staff productivity?

- A. We do not track physician and/or provider productivity.
- B. We utilize a manual process to track physician and/or provider productivity.
- C. We utilize our Electronic Health Records system to track physician and/or provider productivity.
- D. We utilize a third-party software system to track physician and/or provider productivity.
- E. We utilize software to track productivity and a group or committee meets regularly to implement changes based upon the results.

Does your organization have a process for regularly reviewing contracted rates from Health Plans?

- A. No, we do not regularly review contracted rates from our Health Plans.
- B. We have a specific person or department responsible for reviewing and executing contracts. However, they do not regularly review previously executed contractual rates.
- C. We have a specific person or department responsible for reviewing, executing, and tracking contracts with the Health Plans.
- D. We have a specific person or department responsible for reviewing, executing, and tracking contracts. This person or department periodically meets with the Health Plans to discuss contracted rates and modifications that may be necessary.

How satisfied are you with your organization's overall clean claims and denials percentages?

- A. Not satisfied at all.
- B. Somewhat satisfied with lots of room for improvement.
- C. Moderately satisfied with some room for improvement.
- D. Very satisfied with only minor areas of improvement.
- E. Fully satisfied.

Risk & Compliance

Does your organization have a structured process for regularly reviewing, creating, or modifying policies and procedures?

- A. We do not have a group or committee that regularly reviews policies and procedures.
- B. We have a group or committee that meets occasionally to create and approve new policies and procedures only.
- C. We have a group or committee that meets occasionally to create, review, and modify policies and procedures.
- D. We have a group or committee that meets regularly to create, review, and modify policies and procedures. We also have a policy that defines how often policies are reviewed and updated.

Describe your organization's process or structure for reviewing organizational risks and/or incidents.

- A. We do not have a process or structure for reviewing organizational risks or incidents.
- B. We have a person who is responsible for reviewing incidents, however, they do not proactively review organizational risks.
- C. We have a person or Officer who is responsible for reviewing organizational risks and incidents.
- D. We have a group or committee who meet regularly to review organizational and risks and incidents. This group also reports regularly to organizational leadership.

Do your clinical sites regularly conduct internal or self-assessment audits?

- A. We do not regularly conduct internal or self-assessment audits.
- B. We only conduct internal or self-assessment audits following an official audit by an outside entity (State government or licensure, CMS, OIG, Joint Commission, etc.).
- C. Each individual clinic site is responsible for conducting their own non-standardized readiness audits.
- D. Our clinic sites conduct periodic internal or self-assessment audits in conjunction with organizationally defined audit protocols.
- E. Our clinic sites conduct monthly internal or self-assessment audits in conjunction with organizationally defined audit protocols. Quarterly and/or bi-annual internal validation audits are also conducted.



Responses

Mostly E's

This is a high performing organization and shows strong skills in most if not all areas. Recommendation: Re-evaluate in 10-12 months as there is always room for continued improvement and growth.

Mostly D's

This organization is performing well. There are areas that require improvement to maintain high performance and have opportunities for increased efficiencies and positive results. Recommendation: Re-evaluate in 8-10 months.

Mostly C's

Functional Organization – operating efficiently in some areas and have multiple areas for improvement. Recommendation: Seek assessment or remediation utilizing John Lynch & Associates' Organizational Evaluation Process within 5-7 months.

Mostly B's

Low performing organization - chances for organizational risk are high and can impact patient care, patient safety, financial struggles, and potential risk for negative patient experience and employee engagement. Recommendation: Seek assistance utilizing John Lynch & Associates' Organizational Evaluation Process within 2-4 months.

Mostly A's

Recommendation for an immediate in-depth assessment. Chances for large scale organizational risk are high resulting in patient safety issues, financial struggles, and potential risk for negative patient experience and employee engagement. Recommendation: Major structural changes are recommended or may be necessary. Seek assistance utilizing John Lynch & Associates' Organizational Evaluation Process within 1-2 months.

Thank you for taking the time to complete our simplified version of John Lynch & Associates' Organizational Health Assessment. Keep in mind that this simplified version is simply a glimpse of our Organizational Evaluation Process. Contact us today at 623-980-8018 to discuss your results and to determine our next steps together.