# Practice Management Curriculum Objectives

## CMA 2-Day Seminar Meeting the Needs of Core Curriculum Needs

### 1. Evaluating Medical Practice Opportunities
1.1. This session helps residents get started as a professional. It demonstrates the importance of assembling and seeking the advice of the professional advisory team. Residents will learn:

- 1.1.1. Establishing one’s professional team.
- 1.1.2. The evaluation process for short and long term practice opportunities.
- 1.1.3. To take ownership for all of your personal and professional decisions.
- 1.1.4. Locum options and locum evaluation checklist.
- 1.1.5. Advantages/disadvantages of solo and group practices, and association and partnership.
- 1.1.6. Advantages and disadvantages of Salaried and Self-employed.
- 1.1.7. Introduction to the latest Primary Care Reform and Patient Enrolled Models.
- 1.1.8. Practice Evaluation Checklist.

### 2. Getting Started
2.1. Plan and set up office protocols and procedures.
2.2. Plan and set up patient education resources (i.e. pamphlets, websites).
2.3. Establish a new patient meet and greet protocol.

### 3. Medical Record Guidelines
3.1. Medical Records assists residents, the physician and their colleagues with the ongoing care of patients. Family Medicine residents will:

- 3.1.1. Understand the importance of keeping good records.
- 3.1.2. The length of time a record must be kept.
- 3.1.3. Learn which systems are best.
- 3.1.4. Learn what must be included in a patient record.
- 3.1.5. Efficient and effective review of charts for the purpose of writing reports, regulatory body reviews, provincial government Medical Review Committee inquiries and CMPA reviews.
- 3.1.6. Essential components of a comprehensively linked Electronic Medical Records system.

### 4. Staffing Issues
4.1. The Staffing Issues presentation discusses the variety of staffing requirements and functions commonly seen in family practice. Residents will learn:

- 4.1.1. Staffing requirements, job descriptions.
- 4.1.2. The hiring process & probationary periods.
- 4.1.3. Performance evaluations.
- 4.1.4. Employer responsibilities – payroll and benefits.
- 4.1.5. Letting staff go – proper dismissal protocols.

### 5. Setting Up Your Office
5.1. This session introduces the new entrant to the many mechanical and logistical issues that should be addressed to ensure the office runs efficiently and effectively. It illustrates the areas in which the economies of scale favor group practice and the expenses of office operation and setup. Residents will learn:

- 5.1.1. Office equipment and medical supplies.
- 5.1.2. Office communication options – phones & faxes.
- 5.1.3. Information technology applications in practice.
- 5.1.4. Yearly office operational costs.
6. The Principles of Billing

6.1. A significant portion of most physicians’ income will rely directly or indirectly on fee-for-service billings. This may also apply to some salaried physicians. Therefore, the income is received upon billing and receipt of payment for services rendered. This session will better prepare the residents to appropriately bill for the services they provide when in practice. Residents will learn:

- 6.1.1. When, how and who to bill.
- 6.1.2. Obtaining license and billing numbers.
- 6.1.3. Medical billing software requirements.
- 6.1.4. Billing procedures and remittance review.
- 6.1.5. Billing for uninsured/noninsured services.
- 6.1.6. Alternate billing options.
- 6.1.7. Staying up-to-date with the fee schedule.

7. Personal and Professional Accounting Issues

7.1. This session is provided by an accountant specializing in taxation and covers basic professional accounting principles as they apply to a resident today and future practitioner. Residents will learn about:

- 7.1.1. Personal and professional tax implications.
- 7.1.2. Sound tax planning.

8. Personal Financial Management

8.1. This session provides residents with an unbiased educational presentation based on the principles of investing and financial planning. Residents will learn:

- 8.1.1. The basics of personal and professional cash flow.
- 8.1.2. Budgeting.
- 8.1.3. Debt management.
- 8.1.4. Short and long term investment options.

9. Personal and Professional Insurance Planning

9.1. This session provides residents with an unbiased educational presentation that will help residents understand that insurance planning is part of the overall financial plan, to be uniquely tailored to their needs and to seek objective advice. During this session, residents will learn about:

- 9.1.1. Disability and life insurance.
- 9.1.2. Occupation definitions.
- 9.1.3. Elimination period, riders and benefits.
- 9.1.4. Office overheads.

Throughout the sessions, residents are encouraged to discuss any range of practice management issues and will discover that there are many areas that had not been considered prior to attending the seminar.
**10. Collaboration with Medical Programs**

10.1. The CMA and Practice Solutions recognizes there is limited time and resources available to Canadian medical schools for the development and delivery of additional educational programs. That is why CMA / Practice Solutions provides assistance to Medical Programs in ensuring the effective delivery of practice management education. In addition to providing professional speakers who are experts in the field of practice management, the following is provided to the medical programs.

**11. Support from Practice Solutions, Education**

11.1. CMA / Practice Solutions liaises closely with the Medical Programs throughout the planning period and assists with the following steps:

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<tr>
<td>11.1.1.</td>
<td>Confirm date, time, place, attendees</td>
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<td>11.1.2.</td>
<td>Provide communication tools and information to assist the Program to promote the seminar with residents and faculty</td>
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<td>11.1.3.</td>
<td>Provide funds to assist programs with food and nutritional breaks</td>
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<td>11.1.4.</td>
<td>Provide additional handouts</td>
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*Canadian Medical Association: Practice Management Curriculum*

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