

Practice Management Prep (PM Prep) Reflection Questions and Resource Summary

Reflection One First Half of Residency Year One	
Topic	Question/Identified Resources
Financial Management	<p>To what extent have you discussed your finances with a professional financial adviser as part of career planning?</p> <p>Modules:</p> <ul style="list-style-type: none"> • Getting Started as a Professional Joule (CMA) PDF - 8 pages Practice Management Curriculum module includes: roles that make up a professional advisory team (ex. accountant, legal advisor, etc.). Includes a professional and personal wellness audit. • Financial Planning Joule (CMA) PDF - 14 pages Practice Management Curriculum module includes the components and benefits of a financial plan, managing debt, and incorporation. <p>Checklist:</p> <ul style="list-style-type: none"> • Getting Started as a Professional Joule (CMA) PDF - 2 pages Checklist includes: Action items to review with members of your professional advisory team and general action plan.
Practice Opportunities and Options	<p>To what extent are you aware of the various family medicine practice models you can choose from in your province/territory or other provinces/territories?</p> <p>Modules:</p> <ul style="list-style-type: none"> • Evaluating Practice Opportunities: Family Medicine Joule (CMA) PDF - 30 pages Practice Management Curriculum module includes: Evaluating short- and long- term practice options, costs and benefits of various models, getting started in your chosen practices, and useful resources. • Physician Remuneration Options Joule (CMA) PDF - 27 pages Practice Management Curriculum module includes: remuneration models, billing topics (Workers' Compensation, third party billing) and billing examples. <p>Comparison:</p> <ul style="list-style-type: none"> • Group Practice vs. Solo Practice Joule (CMA) PDF - 1 page Practice Management Curriculum comparison includes: Chart comparing advantages and disadvantages of short-term and long-term salaried positions.

	<ul style="list-style-type: none"> • Short-Term vs Long-Term Salaried Positions Joule (CMA) PDF - 1 page Practice Management Curriculum comparison includes: Chart comparing advantages and disadvantages of short-term and long-term salaried positions. <p>Website:</p> <ul style="list-style-type: none"> • The Patient’s Medical Home The College of Family Physicians of Canada (CFPC) Web site includes toolkits to help teams align practices with Patient's Medical Home principles, Best Advice Guides for Rostering, Physician Remuneration, and Adopting EMRs.
Starting a Medical Practice	To what extent do you understand the roles of the CFPC and the provincial licensing bodies (regulatory colleges) as you start family medicine practice?
	<p>Website:</p> <ul style="list-style-type: none"> • First Five Years in Family Practice: National and provincial resources The College of Family Physicians of Canada (CFPC) CFPC Transition to Practice website includes: National and provincial resources for transitioning to practice.
Medico-Legal Issues	How familiar are you with common medical-legal concepts and issues that family physicians may face (e.g., disclosure of harm, why documentation matters, consent to treatment, privacy/confidentiality)?
	<p>Website:</p> <ul style="list-style-type: none"> • Key Concepts & Good Practices Canadian Medical Protective Association (CMPA) Website includes: A summary of key concepts and good practices for key topics such as patient safety, communication, managing risk, and adverse events. • Risk Management Toolbox Canadian Medical Protective Association (CMPA) Website includes: A repository of tools to manage medical-legal risk in office practice. <p>Events:</p> <ul style="list-style-type: none"> • CMPA Residents’ Symposium Canadian Medical Protective Association (CMPA) One day In person event includes: Symposium targeted to residents focused on patient safety and medical-legal risk reduction. <p>Website:</p> <ul style="list-style-type: none"> • Additional resources for the CMPA Resident Symposium Canadian Medical Protective Association (CMPA) Website includes: Additional resources focusing on patient safety

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	and medical-legal risk reduction, and the topic addressed in to the CMPA Resident Symposium.
Career Management and Work-Life Balance	How familiar are you with factors that contribute to physician burnout at this stage of your training?
	<p>Website:</p> <ul style="list-style-type: none"> • Physician Health and Wellness Canadian Medical Association (CMA) Website includes: Tools and resources to support physician wellness, identifies key factors that affect wellness for residents, and presentations from past wellness conferences. • Resiliency curriculum and resources Resident Doctors of Canada (RDoC) Website includes: Information about the RDoC's resiliency curriculum, past-presentations, webinar sign-up, and mobile app access.
Supporting Lifelong Learning	To what extent are you familiar with the continuing professional development (CPD) requirements for family physicians and the CFPC's Mainpro+® program?
	<p>Website:</p> <ul style="list-style-type: none"> • Overview of continuing professional development (CPD) requirements & programs The College of Family Physicians of Canada (CFPC) Website includes: An overview of Mainpro+/CPD requirements, types of credits and programs, and how to report your credits.
Reflection Two	
Second Half of Residency Year One	
Financial Management	To what extent do you understand the different types of remuneration models available to family physicians?
	<p>Modules:</p> <ul style="list-style-type: none"> • Physician Remuneration Options Joule (CMA) PDF - 27 pages Practice Management Curriculum module includes: remuneration models, billing topics (Workers' Compensation, third party billing) and billing examples. • Best Advice guide: Physician Remuneration in a Patient's Medical Home The College of Family Physicians of Canada (CFPC) PDF - Summary: 1 page, Full Guide: 18 pages Patient's Medical Home Best Advice Guide includes: Remuneration models and impacts of models on patient and community needs.
Practice Opportunities and Options	To what extent have you considered which factors will be important to you when choosing your ideal future practice? Common factors include the work schedule, urban or rural setting, provincial factors, solo or team practice, focused practice, teaching opportunities, etc.
	Module:

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	<ul style="list-style-type: none"> • Evaluating Practice Opportunities: Family Medicine Joule (CMA) PDF - 30 pages Practice Management Curriculum module includes: Evaluating short- and long- term practice options, costs and benefits of various models, getting started in your chosen practices, and useful resources. <p>Comparison:</p> <ul style="list-style-type: none"> • Group Practice vs. Solo Practice Joule (CMA) PDF - 1 page Practice Management Curriculum comparison includes: Chart comparing advantages and disadvantages of short-term and long-term salaried positions. • Short-Term vs Long-Term Salaried Positions Joule (CMA) PDF - 1 page Practice Management Curriculum comparison includes: Chart comparing advantages and disadvantages of short-term and long-term salaried positions. • Practice Comparison Grid Joule (CMA) PDF - 3 pages Practice Management Curriculum comparison includes: Chart comparing clinical responsibilities, practice populations, scheduling, financial considerations, and contractual information.
Starting a Medical Practice	To what extent do you know about the types of legal documents you may need to become familiar with when starting practice (e.g., wills, leases, group practice contracts)?
	<p>Module:</p> <ul style="list-style-type: none"> • Legal issues for physicians Joule (CMA) PDF - 10 pages Practice Management Curriculum module includes: Why you need legal advice, wills/power of attorneys/healthcare directives, professional contracts, and medico-legal issues.
Medico-Legal Issues	To what extent are you aware of the medico-legal concerns that make up the majority of Regulatory College complaints/lawsuits in early career?
	<p>Article:</p> <ul style="list-style-type: none"> • Practical Tips for Physicians in their First Five Years Canadian Medical Protective Association (CMPA) 1400 words Brief article includes: Three common themes for new-in-practice physicians - follow-up of test results, ending the physician-patient relationship, and knowing when to ask for help. <p>Events:</p> <ul style="list-style-type: none"> • CMPA Residents' Symposium Canadian Medical Protective Association (CMPA) One day In person event includes: Symposium targeted to residents focused on patient safety and medical-legal risk reduction.

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	<p>Website:</p> <ul style="list-style-type: none"> • Additional resources for the CMPA Resident Symposium Canadian Medical Protective Association (CMPA) Website includes: Additional resources focusing on patient safety and medical-legal risk reduction, and the topic addressed in to the CMPA Resident Symposium.
Career Management and Work-Life Balance	To what extent are you aware of the major stressors that often affect residents at this point in their careers (e.g., personal, professional, financial)?
	<p>Module:</p> <ul style="list-style-type: none"> • Skills-Based Resiliency Training for Residents Resident Doctors of Canada (RDoC) PDF - 85 pages Module includes: Presentation of the curriculum with three resiliency tools: The Mental Health Continuum, The Big 4+: Resiliency Skills, and How to H.E.L.P. your colleagues. <p>Website:</p> <ul style="list-style-type: none"> • Resiliency curriculum and resources Resident Doctors of Canada (RDoC) Website includes: Information about the RDoC's resiliency curriculum, past-presentations, webinar sign-up, and mobile app access.
Supporting Lifelong Learning	To what extent are you familiar with the CFPC's Mainpro+® CPD opportunities for residents?
	<p>Website:</p> <ul style="list-style-type: none"> • Mainpro+ for Resident Members The College of Family Physicians of Canada (CFPC) Website includes: The CFPC's overview of Mainpro+ for residents describes carry-over credits. • CFPC Self Learning The College of Family Physicians of Canada (CFPC) Website includes: Access to the online CFPC Self Learning program, a CPD program created by family physicians that is free for resident CFPC members.
Reflection Three First Half of Residency Year Two	
Financial Management	To what extent have you thought about the types of insurance coverage you need for your practice career (e.g., disability, life, health, practice)?
	<p>Module:</p> <ul style="list-style-type: none"> • Personal and professional insurance Joule (CMA) PDF - 20 pages Practice Management Curriculum module includes: Personal and

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	professional insurance requirements, and the importance of having insurance.
Practice Opportunities and Options	To what extent have you made decisions related to the type of practice/practice model you would like to have?
	<p>Module:</p> <ul style="list-style-type: none"> • Evaluating Practice Opportunities: Family Medicine Joule (CMA) PDF - 30 pages Practice Management Curriculum module includes: Evaluating short- and long- term practice options, costs and benefits of various models, getting started in your chosen practices, and useful resources. <p>Checklist:</p> <ul style="list-style-type: none"> • Practice Evaluation Checklist and Action Plan Joule (CMA) PDF - 4 pages Practice Management Curriculum comparison includes: Checklist for considerations around lifestyle, salary, schedule, administration, and finances. • Group practice evaluation checklist Joule (CMA) PDF - 4 pages Practice Management Curriculum checklist includes: Considerations for group practice interviews, such as practice styles, administrative support, remuneration, staffing policies, and practice policies. • Locum Evaluation Checklist Joule (CMA) PDF - 3 pages Practice Management Curriculum checklist includes: Considerations for locum evaluations including scope and style of practice, charting, and contracts. <p>Comparison:</p> <ul style="list-style-type: none"> • Group Practice vs. Solo Practice Joule (CMA) PDF - 1 page Practice Management Curriculum comparison includes: Chart comparing advantages and disadvantages of group practice and solo practice. • Short-Term vs Long-Term Salaried Positions Joule (CMA) PDF - 1 page Practice Management Curriculum comparison includes: Chart comparing advantages and disadvantages of short-term and long-term salaried positions.
Starting a Medical Practice	To what extent do you know whom/where to ask for help when negotiating contracts (e.g., employee/employment contracts, locum contracts, office leases)?
	Modules:

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	<ul style="list-style-type: none"> • Principles of negotiation Joule (CMA) PDF - 18 pages Practice Management Curriculum module includes: Essentials of negotiation, assessing practice opportunities, approval of negotiated terms and legal support. • Locums: Negotiating a mutually beneficial locum contract Joule (CMA) PDF - 17 pages Practice Management Curriculum module includes: Evaluation checklist, fee-sharing and billing arrangements, steps for a smooth locum, and importance of a mutually beneficial contract. • Getting started as a professional (aka Setting up your professional advisory team) Joule (CMA) PDF - 8 pages Practice Management Curriculum module includes: roles that make up a professional advisory team (ex. Accountant, Legal Advisor, etc.). Includes a Professional and Personal Wellness Audit. <p>Checklist:</p> <ul style="list-style-type: none"> • Principles of Negotiation Joule (CMA) PDF - 1 page Practice Management Curriculum checklist includes: Principles of negotiation for an agreement that will satisfy both parties. <p>Summary:</p> <ul style="list-style-type: none"> • Key Contract Points – Group Practice Joule (CMA) PDF - 1 page Practice Management Curriculum summary includes: Twelve specific issues that contracts should address.
Medico-Legal Issues	To what extent would you know how you to address a Regulatory College Complaint?
	<p>Articles:</p> <ul style="list-style-type: none"> • CMPA – Understanding how Colleges handle complaints or allegations of professional misconduct Canadian Medical Protective Association (CMPA) 1900 words Brief article includes: Details on how the regulatory colleges investigates complaints, outcomes, penalties, and appeals. • What to do if you’re notified of a College complaint Canadian Medical Protective Association (CMPA) 1500 words Brief article includes: Key actions if a physician receives a complaint and managing associated stress.
Career Management and Work-Life Balance	To what extent have you thought about the kinds of stressors you might face and how you can prepare for them as you transition into practice?
	<p>Article:</p> <ul style="list-style-type: none"> • Combating physician burnout Canadian Family Physician (CFPC) 600 words Article includes: Indicators of burnout, risk factors for burnout,

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	<p>and strategies to address or prevent burnout.</p> <p>Websites:</p> <ul style="list-style-type: none"> • Physician Wellness Canadian Medical Protective Association (CMPA) Website includes: Contact information for the CMPA, repository of CMPA articles about physician wellness in medical-legal situations, and provincial physician health programs. • Clinician Well-Being Knowledge Hub National Academy of Medicine Website includes: Causes, effects, solutions and resources for clinician burnout.
Supporting Lifelong Learning	To what extent do you value lifelong learning for physicians?
	<p>Website:</p> <ul style="list-style-type: none"> • Mainpro+ Overview The College of Family Physicians of Canada (CFPC) Website includes: An overview of Mainpro+/CPD requirements, types of credits and programs, and how to report your credits. <p>Article:</p> <ul style="list-style-type: none"> • Effects of continuing professional development on clinical performance Canadian Family Physician (CFPC) 3900 words Article includes: Results of a study to evaluate the link between the quantity and quality of continuing professional development activities completed by family physicians in Quebec and the quality of their practice.
Reflection Four Second Half of Residency Year Two	
Financial Management	To what extent have you addressed the key financial planning steps needed to start your practice/career (e.g. speaking to a financial advisor, pros/cons of incorporation, etc.)?
	<p>Modules:</p> <ul style="list-style-type: none"> • Financial Planning Joule (CMA) PDF - 14 pages Practice Management Curriculum module includes: the components and benefits of a financial plan, managing debt, and incorporation. • Personal and Professional Accounting and Taxation Joule (CMA) PDF - 28 pages Practice Management Curriculum module includes: Accounting and taxation basics, tax deductions, incorporation, GST and HST, selecting an accountant.

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Practice Opportunities and Options	To what extent are you aware of the resources and guidelines available to help you start your practice/career?
	<p>Checklist:</p> <ul style="list-style-type: none"> • Checklist of things to do before starting practice (Family Medicine) Joule (CMA) PDF - 2 pages Practice Management Curriculum checklist includes: Timeline of actions for residents starting practice in family medicine. <p>Websites:</p> <ul style="list-style-type: none"> • First Five Years in Family Practice: Transition to Practice The College of Family Physicians of Canada (CFPC) CFPC Transition to Practice website includes: National and provincial resources for transitioning to practice. • First Five Years in Family Practice Canada Facebook group The College of Family Physicians of Canada (CFPC) Facebook peer support group to connect with and ask questions of colleagues in their first five years in family practice.
Starting a Medical Practice	To what extent are you comfortable with your ability to address the business/administrative responsibilities you may have when you begin practice (e.g., human resource management, interprofessional relationships, conflict resolution, managerial roles)?
	<p>Modules:</p> <ul style="list-style-type: none"> • Starting your family practice on the right foot (aka Policies and procedures for a successful medical practice) Joule (CMA) PDF - 24 pages Practice Management Curriculum module includes: Establishing policies and procedures for your practice, develop patient information materials, and develop a first visit protocol. • Staffing and Human Resources Joule (CMA) PDF - 24 pages Practice Management Curriculum module includes: Staffing requirements, the hiring process, interviewing, your responsibilities as an employer, and termination of employment. • Setting up your medical or clinical office Joule (CMA) PDF - 14 pages Practice Management Curriculum module includes: Needs assessment for medical office design, an overview of the key areas in a medical office, choosing equipment, and planning for technology. <p>Summaries:</p> <ul style="list-style-type: none"> • Staffing Dos and Don'ts Joule (CMA) PDF - 1 page Practice Management Curriculum summary includes: The Dos and Don'ts of hiring and managing staff.

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	<ul style="list-style-type: none"> • Sample Interview Questions Joule (CMA) PDF - 2 pages Practice Management Curriculum summary includes: Interview questions for job-sharing nursing positions. <p>Checklists:</p> <ul style="list-style-type: none"> • Office Set Up Checklist Joule (CMA) PDF - 3 pages Practice Management Curriculum checklist includes: Items to consider for areas of the medical office, including public access, waiting room, and common areas.
Medico-Legal Issues	How familiar are you with the licensing authorities' investigation processes and the importance of documentation in managing risks?
	<p>Articles:</p> <ul style="list-style-type: none"> • Writing with care Canadian Medical Protective Association (CMPA) 1300 words Brief article includes: Key points for documentation, including detail need, tone and language, and timelines for documenting. • Responding to a billing audit: How good records can help Canadian Medical Protective Association (CMPA) 450 words Brief article includes: Best practices for documentation to assist with a billing-audit.
Career Management and Work-Life Balance	To what extent have you identified mentors to help you in the various facets of your career planning? If you have not identified mentors, to what extent are you aware of resources available to you to support your career planning?
	<p>Websites:</p> <ul style="list-style-type: none"> • Career Resources Resident Doctors of Canada (RDoC) Website includes: A repository of resources for transition to practice, recruiting websites, and specialty associations. • Early-Career Profiles Resident Doctors of Canada (RDoC) and The College of Family Physicians of Canada (CFPC) Profiles of physicians and residents in family medicine include a typical day, clinical life, challenges, and tips for practice. • First Five Years Transition to Practice The College of Family Physicians of Canada (CFPC) CFPC Transition to Practice website includes: National and provincial resources for transitioning to practice, and resources for recruiting and job postings.
Supporting Lifelong Learning	To what extent do you feel prepared for your first year in practice regarding the six areas of practice management?
	<p>Website:</p> <ul style="list-style-type: none"> • Repository of Practice Management Resources by Topic The College of Family Physicians of Canada (CFPC)

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	Website includes: A complete list of the resources included in the PM Prep Reflections, categorized by practice management topics.
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