HOW TO: WORKFLOW REDESIGN

Use this sheet as a guide during the implementation process, check off each of the workflow areas once you have evaluated them, it's also a good idea to enter a date of evaluation.

Workflow Area **Evaluate Each of the workflow areas and determine need for change, remember who, what, why, how long, what steps will be eliminated or added in the electronic world**	**Completed Pre EHR Manual**	**Completed Post EHR Electronic**
Scheduling/Front Desk		
Making Appointments		
Canceling Appointments		
Rescheduling Appointments		
Documenting Telephone Messages		
Patient Appointment Reminders		
Patient Arrives (or not)/Front Desk		
Patient Registration (updating and verifying personal information; consent forms and insurance card scanning)		
Patient Check-in process		
Walk-ins		
Patient No-shows		
Collecting and Documenting Co-pays		
Alert MA/Nurse of arrival		
End-of-day Reconciliation		
The Patient Visit: MA/Nurse		
Access or Pull-up Patient Chart/Record		
Prep Patient: chief complaint/medication history/allergies/vitals		
In-house Labs (Urine Dipstick, BG, Urine Pregnancy, Rapid Strep, A1C)		
Document previous Pap. Mammogram, FOBT, Colon/Sigmoidoscopy		
PPDs		
Immunizations/Injections		
Print Lab Requisitions		
The Patient Visit: Exam		
Progress Note		
Decision Support Alerts		
Writing Prescriptions (narcotics)		
Generate Internal/External Referrals		
Telephone Encounters		
Labs/Tests		
Ordering Labs/Tests		
Processing In-house Labs		

Labs received on paper		
Reviewing Lab Results		
Recalling, reviewing and trending Abnormal Labs		
Specialty Services		
Documenting for Nutritional Services		
Documenting for HIV Services		
Documenting for Social Services		
Documenting for Health Education Services		
End of Patient Visit		
Patient Check-out process (scheduling follow-up appointments)		
Referrals/Education		
Internal Referral		
External Referral		
Providing Educational Materials		
Billing		
Charge Capture		
Encounter Flow		
Coding		
Claim Creation		
Claim Submission		
Payment Processing		
Payment Follow-up with insurance and patient		
Refund Process		
Write Off Process		
Day Sheets Reports		
Other Financial Reports as Needed		
End-of-Day Checklist for Providers		
Lab Results		
Documents		
Referrals		
Telephone Encounters		
Encounter Forms		
Lock Progress Notes		
End-of-Day Checklists for Administration (outstanding or un-reviewed)		
Labs		
Imaging		
Immunizations/Injections		
Referrals		
Refill Requests		
Progress Note Sign-off		
Reports		
Document Management		
Scanning (consults, lab results, correspondence, etc...)		
Producing Letters (reminders, no-shows, etc…)		
Faxes (currently paper, direct fax into fax server)		

Scanning Forms		
Scanning Patient history, patient documents		

SAMPLE: HOW TO WORKFLOW

WORKFLOW: In-house Labs (Urine Dipstick, BG, Urine Pregnancy, Rapid Strep, A1C)

Manual Process:

- Find lab slip (manual)
- Write Patients Name (manual)
- Enter or circle test names on sheet (manual)
- Place lab slip on the door (manual)
- MA/Nurse checks door, pulls lab slip (manual)
- MA/Nurse prepares tubes and lab stickers (manual)
- MA/Nurse checks patients insurance to determine which lab to send sample (manual and electronic)
- Sample drawn (manual)
- Enter Patients insurance information on lab slip (manual data entry)
- Prepare sample, label and send out to lab (manual)

RESULT

- Receive result via fax or courier
- Find and pull patients chart
- Search for phone number
- Call patient and advise of results and further action if necessary
- Document chart with results (write date of call)
- File the chart

SAMPLE: HOW TO WORKFLOW

In an electronic system

WORKFLOW: In-house Labs (Urine Dipstick, BG, Urine Pregnancy, Rapid Strep, A1C)

Beginning from the Progress Note:

- Click on **LAB REPORTS** (manual & electronic)
- In **FIND BOX,** type in the lab or test you are looking for (manual & electronic)
- Click on test to be ordered (lab/test)
- Pop-up window will open with ICD/CPT codes, click **OK**
- Ordered lab/test then appears as a link on the progress note
- Prepare sample, label and send out to lab

RESULT

- Click on ordered lab/test
- In **ASSIGNED TO** box, choose the name of the provider seeing the patient
- Check **RECEIVED**, enter result
- Call Patient
- Annotate where necessary
- Timestamp under notes or system will auto time stamp
- Click **OK**

Practice Workflows

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