

Workflow

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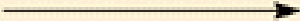

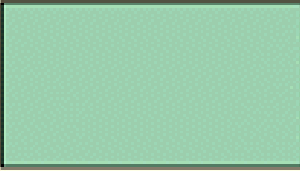
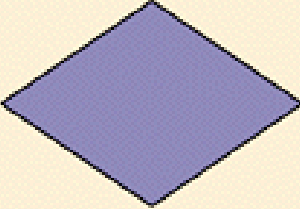
“Every system is perfectly designed to get the results that it gets.”

Paul Batalden, MD

Traditional Workflow Analysis

- Workflow refers to how a process takes place, evaluating the process and improving the process to “flow” more smoothly.
- Workflow can improve efficiency, reduce redundancy and/or identify gaps or areas of instability.

Technical Prose

Name	Symbol	Use in flowchart
Oval		Denotes the beginning or end of a program.
Flow line		Denotes the direction of logic flow in a program.
Parallelogram		Denotes either an input operation (e.g., INPUT) or an output operation (e.g., PRINT).
Rectangle		Denotes a process to be carried out (e.g., an addition).
Diamond		Denotes a decision (or branch) to be made. The program should continue along one of two routes (e.g., IF/THEN/ELSE).

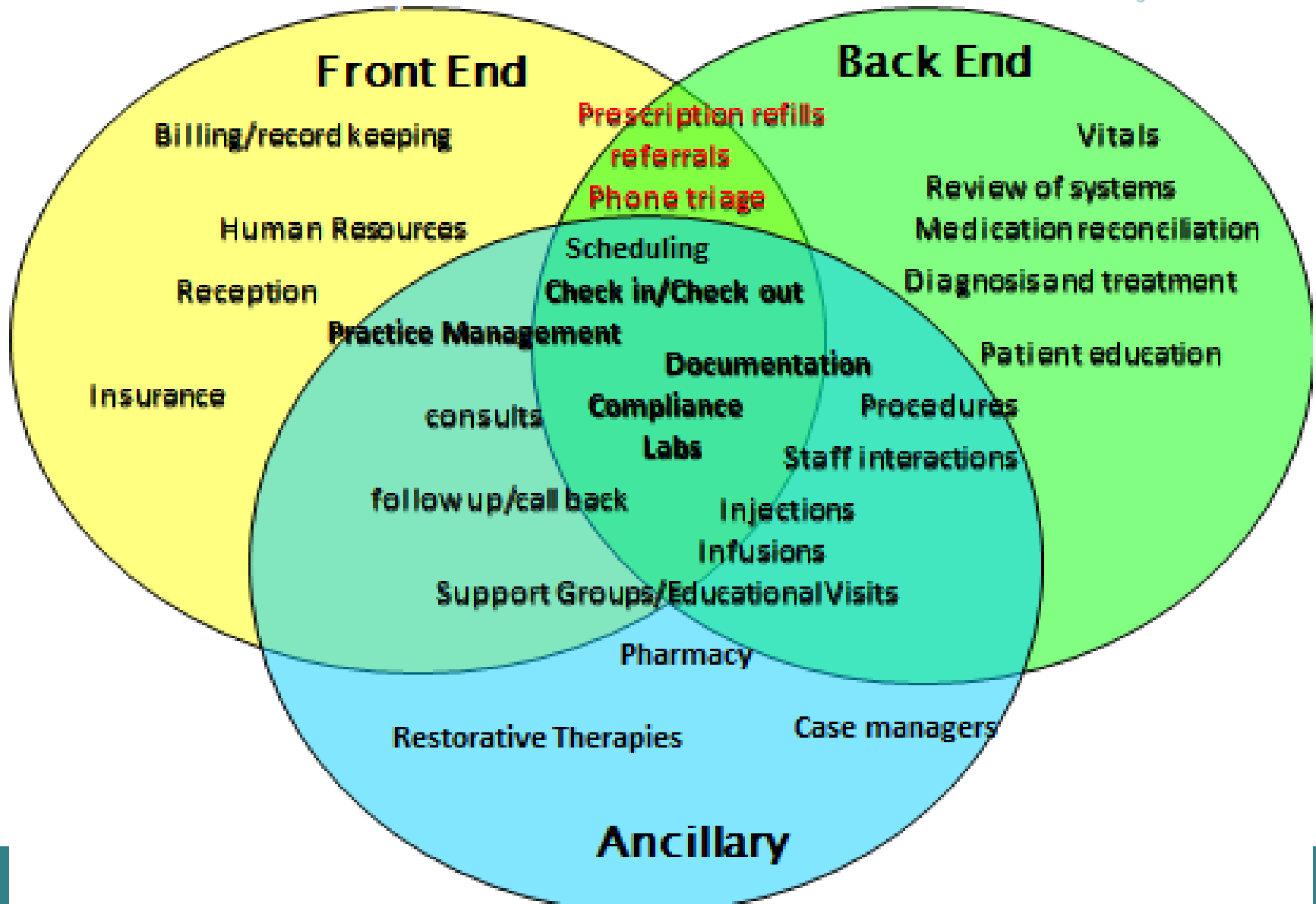
Workflow Analysis

- Evaluating your processes to determine the difference between how you *think* your office operates and how it *actually* operates. (And then what)
- The difference between written procedure and the real world. (what happens when someone is on vacation?)
- Assessing your practice to identify opportunities to improve patient care, improve workforce morale and integrate information technology.... Address conflict.

Office Systems

- A physician office depends on different systems all working together or in parallel.
 - Examples of systems:
 - Scheduling
 - Phones (messaging and triage)
 - Prescription Refills
 - Check in - Check out
 - Patient flow
 - Labs
 - Billing
 - Documentation

Systems in a practice



Processes

Distribute the Core and Supporting Processes evaluation form to practice staff and ask the staff to evaluate the **CURRENT** state of these processes. Rate each process by putting a tally mark under the heading which most closely matches your understanding of the process. Also mark if the process is a source of patient complaints

Your position in the practice (check or circle best response):

Provider Resident Nursing staff/ MA Front office staff Billing/Administration

Primary Care Practice Core and Supporting Processes							
Processes	Works Well (1)	Small Problem (2)	Real Problem (3)	Totally Broken (4)	Cannot Rate (5)	We're Working On It (6)	Source of Patient Complaint (7)
Answering Phones							
Appointment System							
Messaging							
Scheduling Procedures							
Order Diagnostic Testing							
Reporting Diagnostic Test Results							
Prescription Renewal							
Making Referrals							
Pre-authorization for Services							
Billing/Coding							
Phone Advice							
Assignment of Patients to Your Practice							
Orientation of Patients to Your Practice							
New Patient Work-ups							
Minor Procedures							
Education for Patients/Families							
Prevention Assessment/Activities							
Chronic Disease Management							
Palliative Care							
Immunizations							

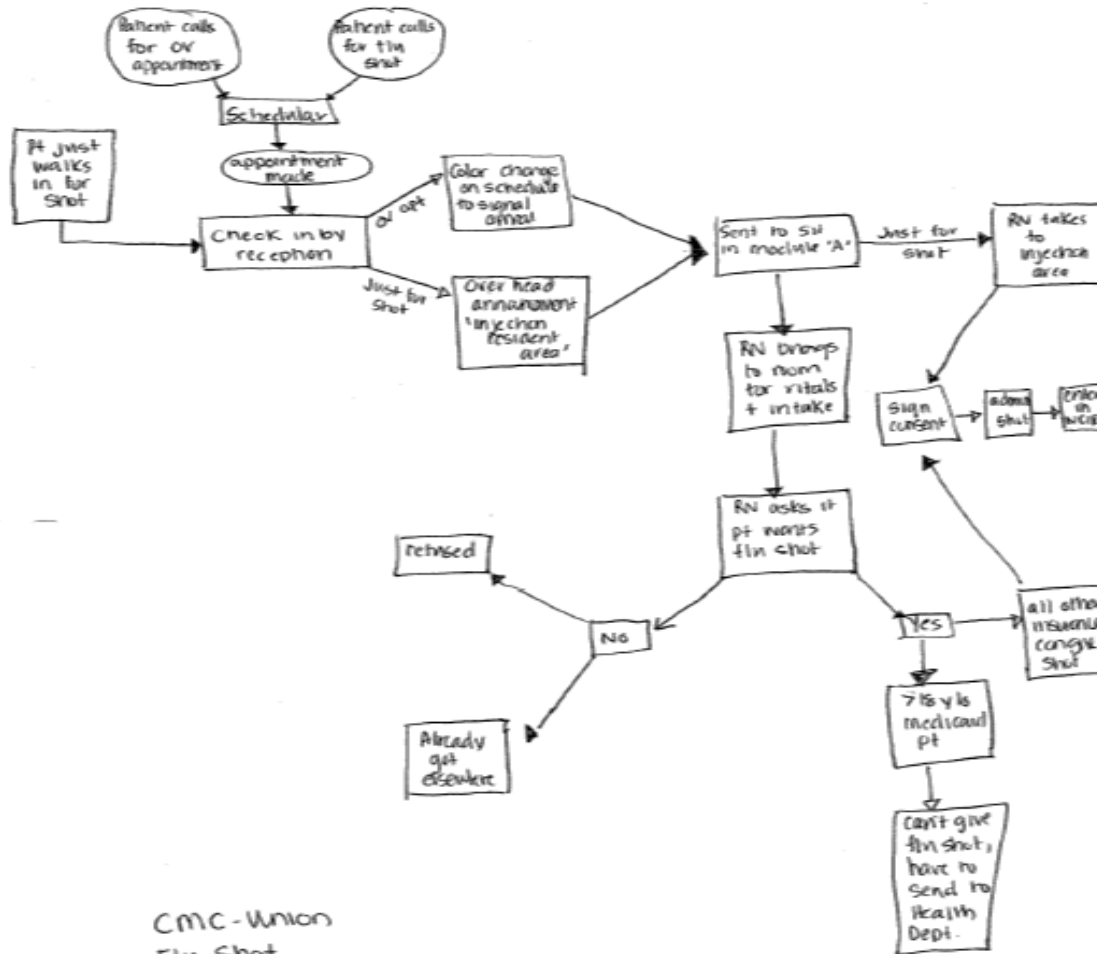
How to start:

- Multi-disciplinary team
- Include someone from every aspect of the system (front end, back end, lab, etc)
- Encourage open dialogue
- Record your system workflow as it truly occurs, not how it should occur
- Record every step, more detail will make it more accurate.
- Don't worry about how it looks

Workflow in Quality Improvement

- Use it to plan a change
- Use it to assign tasks or reassign tasks
- Use it to identify gaps or redundancy
- Use it to see how a change will impact the way things are done in all sections of the office.
- Use it to improve morale by identifying everyone's role in the delivery of healthcare within the organization.
- Use it as a way to identify areas of tension

Flu Vac Flow Map

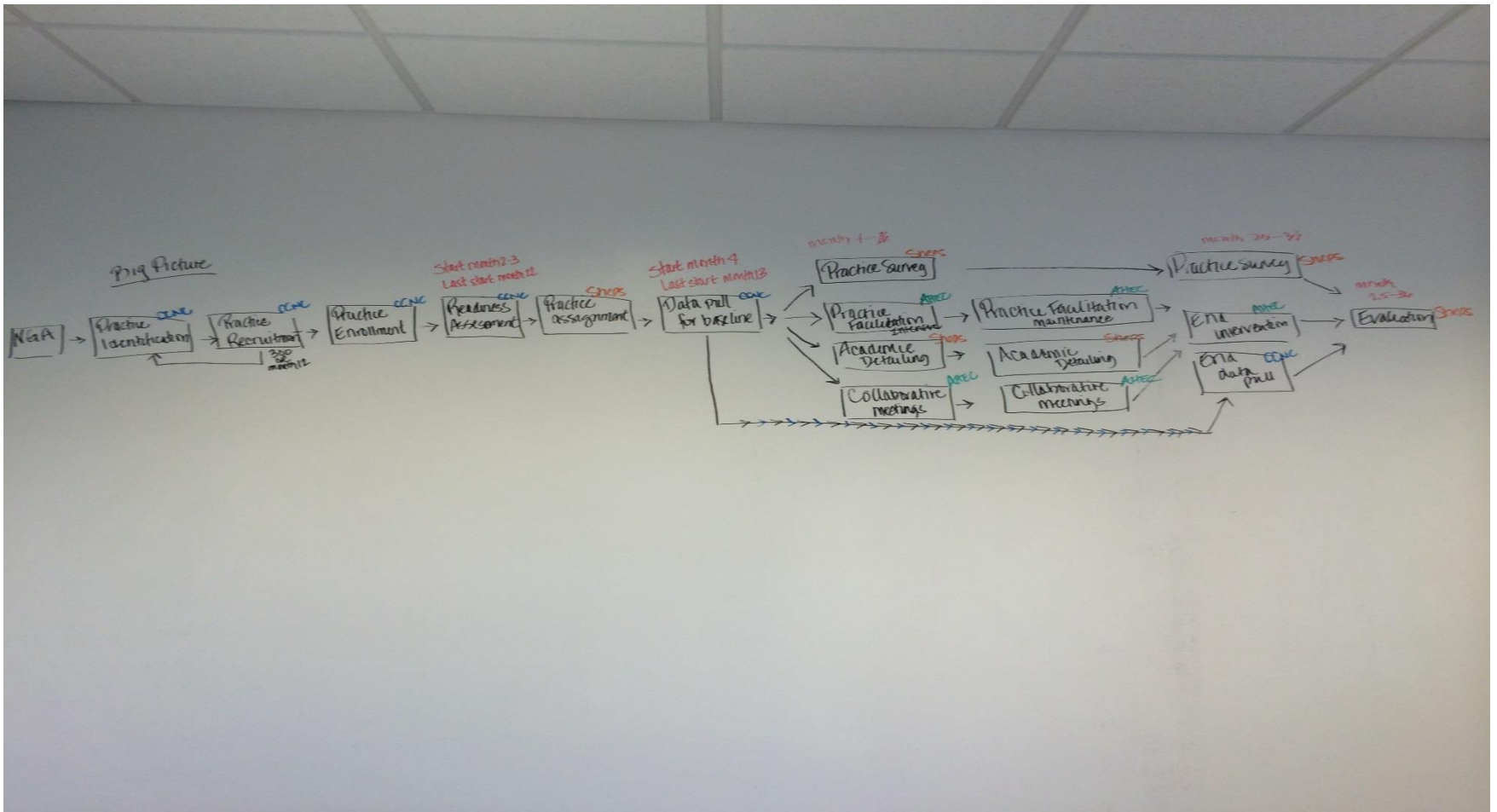


CMC-Union
Flu Shot
Flow Map

To describe a complex process



Who will do what?



Discussion

- How have you used Workflow to implement changes for QI?
- Do you have a way to do it that works for you?
- What are some ways that you've used it that are secondary to designing a new system?

Resources

For more information

The Greenbook

<http://www.clinicalmicrosystem.org/greenBook.htm>