



Evaluating Clinical Workflows: Questions to Ask Before You Go-Live

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Objectives

- Understand the meaning and importance of Clinical Workflow documentation
- Describe 2 strategies of documenting clinical workflows
- Identify at least 1 reason maintaining current state workflows is important
- List techniques to improve clinical workflows in your organization
- Review workflow challenges

Clinical Workflow- Definition

- Workflow- What is it?
 - The process by which tasks are done, by whom, in what order and how quickly
 - McGraw-Hill Concise Dictionary of Modern Medicine. © 2002 by The McGraw-Hill Companies, Inc.

- Current State versus Future State
 - Who does what now, how, when, and why
 - Who will do what in the future, how, when, and why

Clinical Workflow- Importance

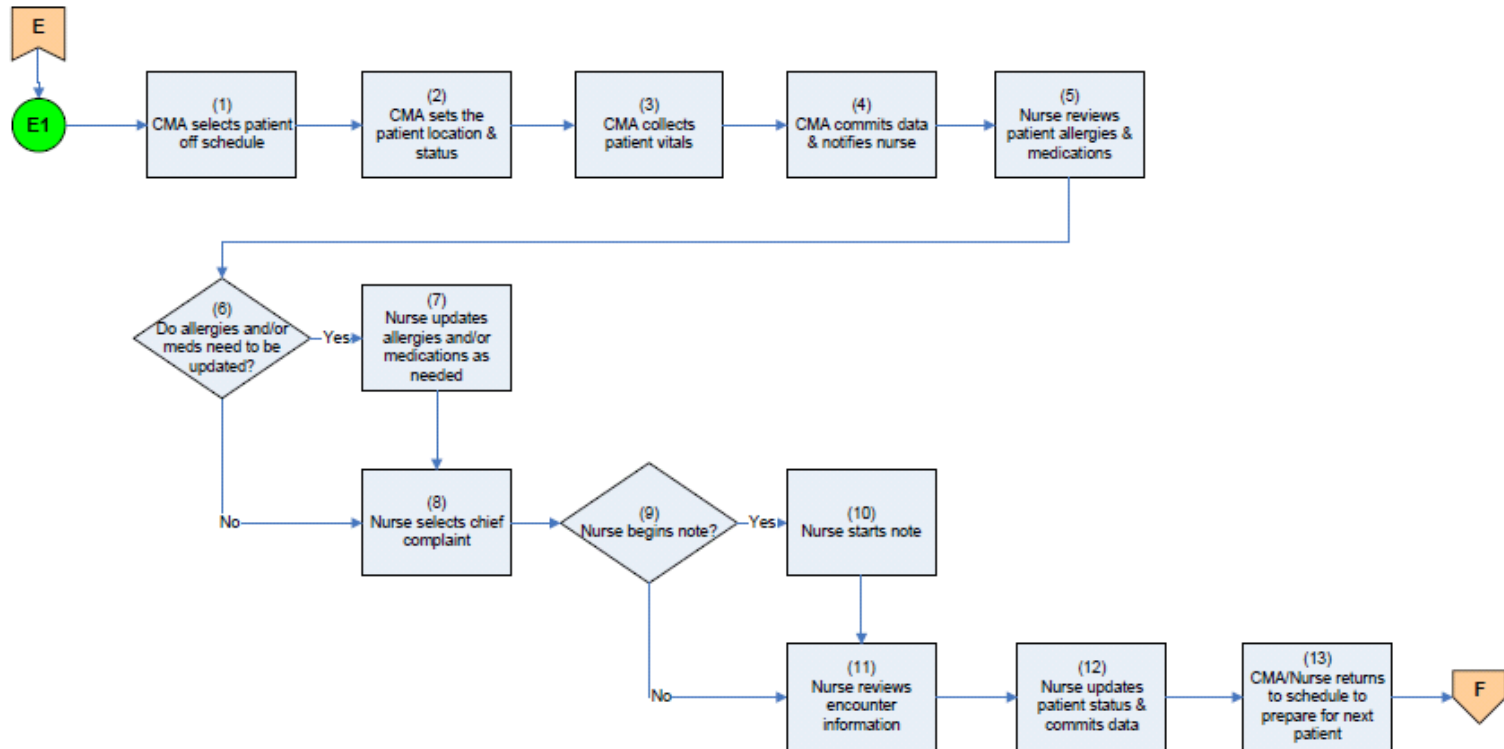
- Why is it important?
 - Knowing what the actual task are of each user (front desk, clinical staff (MA, LPN, RN), Provider (Mid-level, Resident, Fellow, Attending, Ancilliary (Lab/Radiology/Cardiology tech), Billing- will allow for outlining the best workflow in your design of the implementation or post implementation evaluation/improvement or workflows
 - Allows for ease of new user training
 - Provides basis for proper testing of each workflow for future hotfixes/upgrades and necessary changes for training of any changes
 - May increase meaningful use adoption

Clinical Workflow- Documentation

- When should you document workflows?
 - Initiation of new project- implementation, upgrade
 - Annually- recommended
 - Ad Hoc- based on reported end user dissatisfaction
- How do you document workflows and with who?
 - Feet on Street, direct review by role with analyst
 - Ideal to have analyst , Super User, and end user role
 - Visio, Excel, Video capture (Captive)

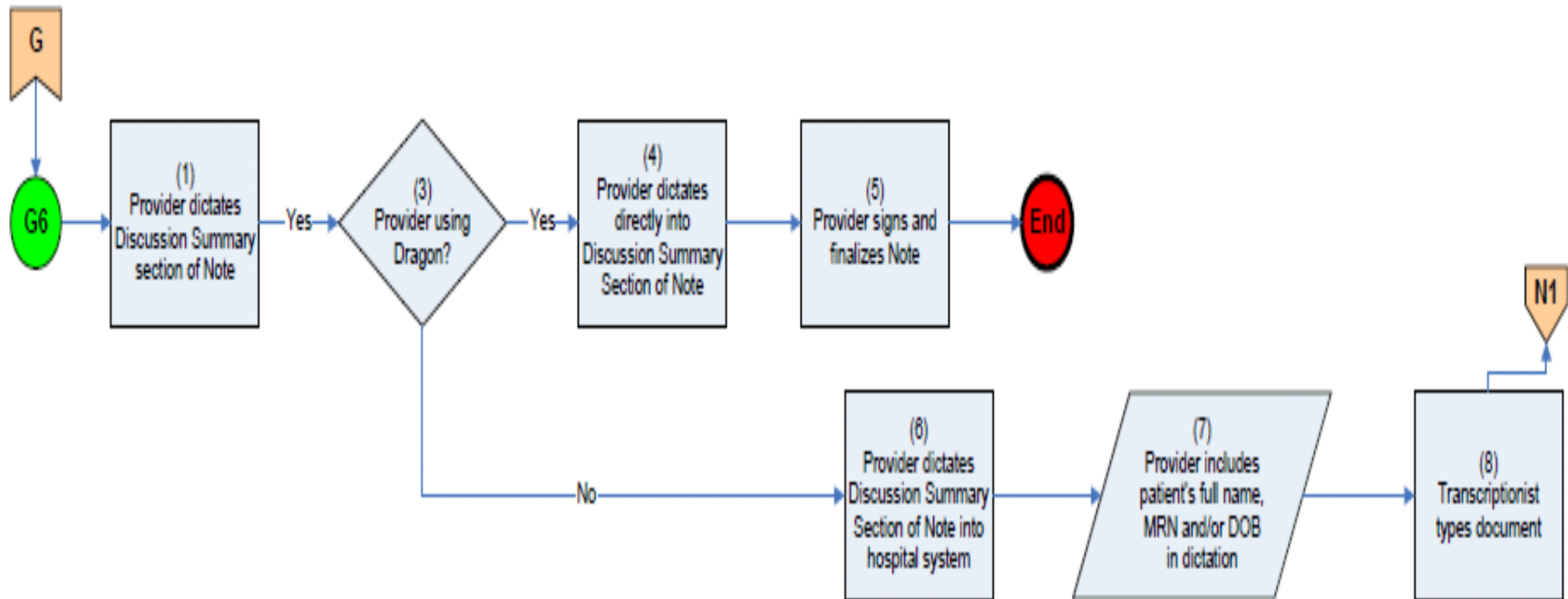
Clinical Workflow- Visio

E1: Intake Process – Basic



Clinical Workflow- Visio

G6: Dictation



Clinical Workflow- Excel/Word

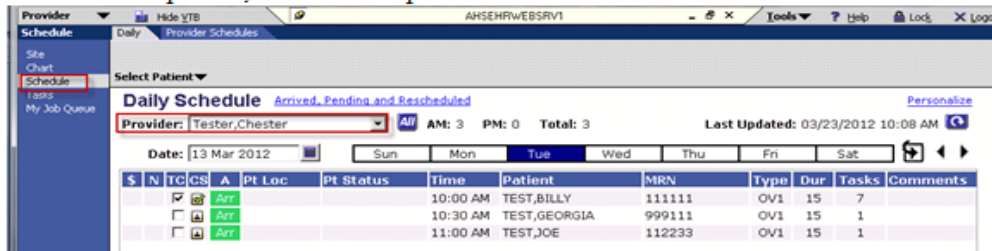
	Login as mjw003 to validate NLL-Phlebotomist Lab role setup
Lab- Specimen Collection	Verify LAB Workplace displays with appropriate menu structure- refer to Word Doc of screen shots
Lab- Specimen Collection	On the Task List HTB, verify Task Views display: My Active Tasks, NLL Phlebotomist
Lab- Specimen Collection	Select Perform Order Tasks from the drop down & validate tasks are present from previous workflows
Lab- Specimen Collection	Double-click on a task. Navigate to the Order detail screen
Lab- Specimen Collection	Go to Additional details if a lab specimen and select Specimen collected
Lab- Specimen Collection	Save and Close- verify the order goes to In Progress- Specimen collected status- Save the Encounter Summary and verify task is complete
Lab- Specimen Collection	Print requisition
Lab- Specimen Collection	Logoff

Clinical Workflow- Excel/Word

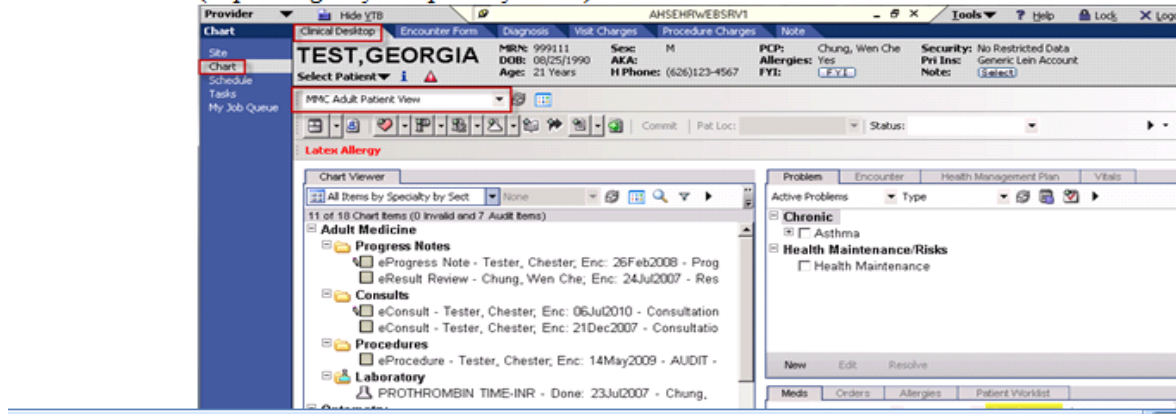
Tester Initials:	Comments:		
Clinical Intake			
Login to Allscripts with identified User ID and Password.	User ID: UPGRADEMA3, Password:		
	Daily Schedule Window appears and the Floating Clinical toolbar will display.		
Single-click identified patient from the Daily Schedule.	Patient/schedule will be provided on sign off sheet.		
	Patient will appear in Patient Banner. .		
Click the Select Button in the Note section of the Patient Banner.	The Note Selector appears with the identified patient and encounter at the top of the window.		
Select the identified Specialty, Note Owner, and Visit Type) as indicated in the Expected Outcomes column.	Specialty: General Surgery		
	Note Owner: XXX, XXX		
Click OK.	Visit Type:H&P Pre-Operative		
	The Note Authoring Workspace appears with the identified patient and encounter at the top of the		

Clinical Workflow- Excel/Word

1. Start in provider's own schedule by clicking on Schedule menu > Daily tab > view reason for visit. NOTE: Schedule can be used for keeping track of arrivals, encounter completion, and note completion.

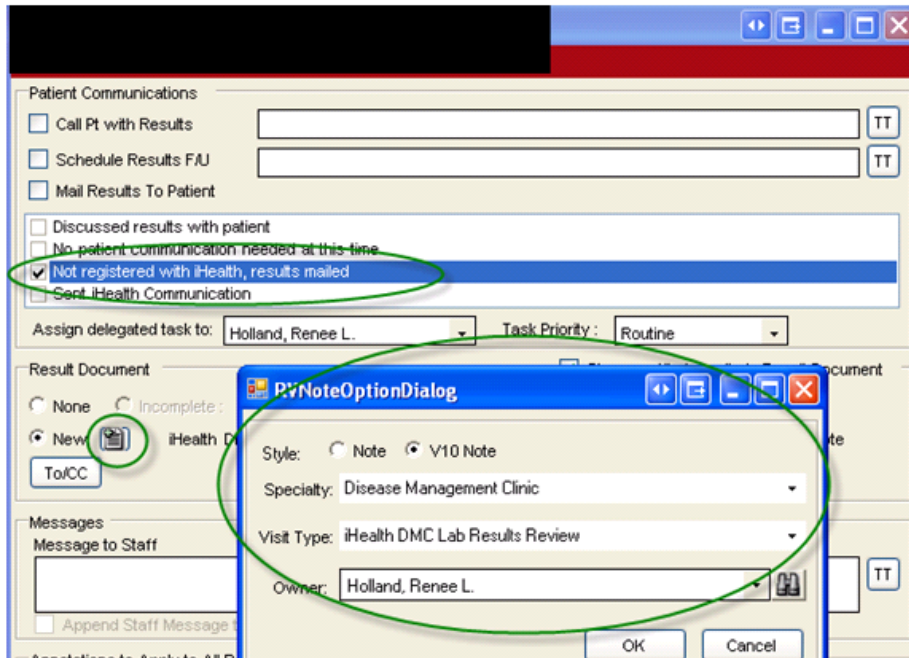


2. **Chart Review Process:** Before seeing patient provider will write down a history summary of patient on a paper progress note. Provider will obtain this information by performing the following steps:
 - a. Double click on patient name and the system will go to the Clinical Desktop- MMC Adult Patient View or MMC Pediatric Patient View (depending on your specialty focus)



Clinical Workflow- Excel/Word

4. From the Verification Dialog Box:
 - Select communication method: Discussed Results with Patient, Not Registered with iHealth, Results Mailed, Sent iHealth Communication
 - Chose a Result V10 Document (chose yourself or physician for whom you starting a note for)
 - Select Verify and Go to Note



Clinical Workflow- Workflows Documented Now What?

Paper versus Optimization

- Identify areas of improvement, streamlining current workflow
- **Paper**
 - Review the Allscripts Certified Workflows per each role and compare to current state organization
 - Identify gaps between the two, areas of streamlining current workload/flow
 - Simulate current state and Certified workflows and/or hybrid of them
 - Demonstrate to end user, super user, work group
 - Configure, test, validate
 - End User practice in real time prior to Go Live to identify issues/concerns
 - Make adjustments, validate, train all end users
 - Go Live
 - Reassess at 30, 60, or 90 days of initial go live

Clinical Workflow- Workflows Documented Now What?

Paper versus Optimization

- Identify areas of improvement, streamlining current workflow
- **Optimization**
 - Identify the problem area
 - Review current state workflow
 - Simulate current state (consider looking at Allscripts Certified Workflows)
 - Speak to the actual end users, ask questions, potentially provide proposals/solutions
 - Investigate (back in the lab) alternatives/improvements
 - Demo to the end user/Super User, work group
 - Have end user/Super User validate it
 - Make adjustments if needed and train all end users
 - Go Live
 - Get feedback

Clinical Workflow- What the are questions to Ask

- **Why is it done this way?**
- **How did you do it before?**
- **How do you think it would work better?**
- **How will this improve your work, efficiency or patient care?**
- **Does anyone else do this same task or duplicate work?**
- **What verbal communication is used in addition to the electronic workflow?**

Clinical Workflow- Examples

- **Problem-** Review Note task related to transcription and if you double-clicked the signed the note, it didn't satisfy the sign note task in addition, they had to done the task. Total clicks 6 clicks
- **Resolution-** have transcriptions use Co-Sign Note task instead. Total clicks 4

Clinical Workflow- Examples

- **Open session**



Further information on Galen services contact:
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