



Workflow Assessment

Clarify and Prioritize

Workflow and process analysis allows you to **identify the tasks you perform, the order of those tasks and the best way to perform those tasks in the EHR** so that clear communication of changes can be made to the entire practice.

The first step in the planning process is for the team to sort tasks into three categories:

- What new work tasks/process are we going to **start** doing?
- What work tasks/process are we going to **stop** doing?
- What work tasks/process are we going to **sustain**?

Assess

1. Identify the **key processes** of the practice.
2. Map out the practice's current process (each step for how work gets done) for each key workflow, including:
 - **Who** does **what** at each step of the process?
 - **Where** does each step occur?
 - How does the practice **communicate** internally about the steps of the process (reception to nursing, nursing to physician, physician back to nursing, nursing to lab, etc.)?
 - What does each person **add** to the chart?
 - What does each person **use** from the chart?

Revise

Draft out **how the EHR** will enable desired workflows and processes in order to create new workflow patterns that improve inefficiency and/or eliminate duplicative processes. **Revisit and revise** new processes as needed.

Provider Visit

Sample Workflow: Provider Visit	Current Process	Kareo EHR Process
<p>What types of information does the front desk gather at check-in?</p> <ul style="list-style-type: none"> • Verification of name and address • Verification of insurance • Copy of insurance card • HIPAA forms • Signed Arbitration form • Other: 		
<p>If you use a PMS, what information is entered or checked at each visit?</p>		
<p>List any information or documents that go with the chart after check-in.</p> <ul style="list-style-type: none"> • Superbill • Extra labels • Patient Hx/ROS Forms • Diagnostic reports • Other: 		
<p>Is the co-pay collected at check-in or check-out?</p>		

Sample Workflow: Provider Visit	Current Process	Kareo EHR Process
How does the clinical staff know the patient has arrived?		
Who takes the patient to the exam room?		
Does the person rooming the patient review the chart for outstanding tasks?		
If there are outstanding tasks how is this communicated to the provider for action?		
What information is gathered before the provider sees the patient? <ul style="list-style-type: none"> • Reason for visit • Vital signs • Medications reviewed • Allergies reviewed • Other: 		
Are any tests done before the provider sees the patient? <ul style="list-style-type: none"> • If yes, please list: 		

Sample Workflow: Provider Visit	Current Process	Kareo EHR Process
Are test results written on a specific type of form? • If yes, describe:		
How does the provider know the patient is ready to be seen?		
What information does the provider review prior to entering the exam room?		
Where is this information located/accessed?		
Where are medications and diagnoses lists maintained?		
What forms (if any) are used during a visit?		
Where are the charges/diagnoses captured for the visit?		

Sample Workflow: Provider Visit	Current Process	Kareo EHR Process
If not the provider, how are immediate tasks communicated within the practice?		
How is patient follow up handled? <ul style="list-style-type: none"> • Appointments • Specialist referrals • Labs/studies 		
What information does the patient bring back to the front desk?		
Do you schedule appointments for referrals to other providers or for tests? <ul style="list-style-type: none"> • If yes, describe: 		
What happens to charges for today's visit?		

Nurse/MA Visit

Sample Workflow: Nurse/MA Visit	Current Process	Kareo EHR Process
<p>Is check-in the same as for provider visits?</p> <ul style="list-style-type: none"> If no, describe: 		
<p>Is the process for rooming the patient the same as for provider visits?</p> <ul style="list-style-type: none"> If no, describe: 		
<p>What information does the MA/nurse review prior to entering the exam room?</p>		
<p>What information is documented at each of these visits?</p>		
<p>How is this information documented?</p>		
<p>Does the nurse/MA work under any protocols for the ordering of any tests?</p> <ul style="list-style-type: none"> If yes, describe: 		
<p>Where are charges/diagnoses captured for this visit?</p>		

Sample Workflow: Nurse/MA Visit	Current Process	Kareo EHR Process
Are patient education handouts given during Nurse/MA visits? • If yes, describe:		
List any forms used during a Nurse/MA visit.		
Where are the charges/diagnoses captured for the visit?		
If the nurse visit turns out to require the provider to also see the patient how is this accomplished?		

Other Key Workflows

Identify the **top 5-10** other key workflows and use the pages below to map out the steps and individuals involved in completing each workflow.

Example workflows:

- Pre-visit registration, scheduling, insurance verification
- Patient intake
- Chart review
- Medical history interview
- Physical examination
- Assessment
- Diagnosis
- Care planning
- Health maintenance
- Staff tasking/back office orders
- Procedure
- Prescribing/samples

- Lab/radiology ordering
- Coding
- Charge capture and billing
- Referral management
- Patient instructions
- Visit summary
- Check out

SPECIAL TYPES OF VISITS

- Same day/urgent visit
- Annual physical exam
- Occupational medicine
- Consultation

NON-VISIT RELATED PROCESSES

- Results review and management
- No show management
- Prescription refill/renewal requests
- Other phone calls/email
- Patient follow up/recall
- Release of information
- Forms completion
- Patient document management
- Chronic disease management
- Quality improvement
- Required reporting

Sample Workflow: _____	Current Process	Kareo EHR Process

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Sample Workflow: _____	Current Process	Kareo EHR Process