Documenting Workflows

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The National Consortium of Telehealth Resource Centers (NCTRC) consists of 14 Telehealth Resource Centers (TRCs). As a consortium, the TRCs have an unparalleled amount of resources available to help virtual programs across the nation, especially within rural communities. Each TRC is staffed with telehealth experts to who are available to provide guidance and answer questions. As telehealth continues to gain more visibility and recognition in healthcare, the TRCs will remain positioned to provide assistance for all.
Poll Question #1

Please answer using Zoom’s polling function.
Poll Question #2

Please answer using Zoom’s polling function.
Do you need COFFEE?

are you Superman?

Yes, Liar

No, you need COFFEE.
What is a Workflow?

- A workflow is the progression of steps or tasks that make up a work process:
  - Physical and/or mental tasks
  - Performed by various people
  - Over time
  - Across roles, teams, or locations
- A workflow map shows a picture of who does what, and in which order
  - Tasks can be sequential or simultaneous

https://healthit.ahrq.gov/health-it-tools-and-resources/workflow-assessment-health-it-toolkit/workflow
Example

My Cat's Decision-Making Tree.

Is that for me?

Yes.
- I don't want it.

No.
- That's for me.
Example

Post-appointment Lab Visit

Provider
- Patient needs lab tests that will be performed in clinic
- Place lab order
- Associate order with diagnosis and sign
- Labels and required forms print in lab
- Provider reviews electronic inbox and reads results

Support Staff/Nurse/Lab Tech
- Attach label to specimen collection container
- Collect specimen
- Complete lab test
- Print lab report
- Open Enter/Edit
- Results and enter test results into EMR
- Results directed to provider's electronic inbox
- Provider participates in need results immediately
- No: Notify provider of results via phone
- Yes: Results directed to provider's electronic inbox
Steps to Map a Workflow

• Identify and **name** the process

• Clarify the **purpose or outcome** of the process

• Identify a **clear start and end point** for the process

• List or draw out the **tasks and decision points** within the process and put them in order

• Define and note **which role** completes each step
Basic Workflow Map Symbols

- **Process Start or End**: Indicates the start and end points of a process.
- **Process Step**: A specific process step, task or activity that is performed.
- **Decision Point**: A point in the process where a yes/no question is required.
- **Reference Point**: Indicates a reference or connection to another workflow.
- **Indicates Meaningful Use Reporting**:
- **Indicates UDS Reporting**:
- **Indicates a Reference Point that is not part of a Decision Point**.
Putting It All Together

Example Process

Purpose: To illustrate what an OCHIN workflow map should look like.
Date Updated: June 8, 2016

Tips:
- Use roles, not names
- Use verbs
Facilitating Workflow Conversations

- Gather your subject matter experts (SMEs)
- Start with pencil and Post-it® notes or dry-erase board
- Ask questions!
- “Walk me through your typical ...“
- “What do you do now?”
- “And then what?”
- “Who does that step?”
- “Who makes that decision?”
- “How do you know to do that?”
- “Tell me more about ...”
- Watch for assumptions
Benefits of Mapping Workflows

- **Defines the tasks** inherent in a process and the order in which they occur
- Establishes **who does what** within a process, thereby reducing ambiguity and confusion
- Provides a clear, concise **visual document** to use as a means of communicating about a process
- Helps to **identify gaps or problem areas** within a process, enabling teams to direct improvement efforts
Long-term Success Strategies

- Designate a champion for team or clinic workflow development and tracking
- Designate an owner for each workflow
- Set a schedule to review and update workflows regularly
- Make sure that workflows are available in a central location that everyone can access; wiki, team binder, etc.
- Define a communication strategy for updating staff when a workflow changes
Virtual Visit End-to-End – Agnostic

Workflow for a clinician to schedule a virtual visit and for a provider to complete the virtual visit.

March 20, 2020

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Conducting a Virtual Visit – Agnostic

Workflow for a provider to complete a virtual visit (telehealth, telemedicine, video).
March 20, 2020

Check-in

- Call patient
- Complete check-in/registration
- Direct patient to login to

Provider

- Log into workstation
- Open encounter/visit
- Launch virtual visit/connect with patient
- Confirm virtual visit consent has been completed
- Enter chief complaint
- Review and update patient history
- Interview and assess patient
- Document progress note
- Document diagnosis and other pertinent information
- Complete visit and sign encounter

Indicates Operational Decision to be made by Organization

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Conducting a Telephone Visit – Agnostic

Workflow for a provider to complete a phone visit with a patient.
March 20, 2020

Check-In
- Call patient at time of phone visit
- Document outgoing phone call information
- Complete check-in/registration
- Transfer phone call

Provider
- Log into workstation
- Open encounter/visit
- Connect with patient
- Enter chief complaint
- Review and update patient history
- Interview and assess patient
- Document progress note
- Document diagnosis and other pertinent information
- Complete visit and sign encounter
- End phone visit

Indicates Operational Decision to be made by Member

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Thank you!

Please visit the National Consortium of Telehealth Resource Centers website at www.telehealthresourcecenter.org for additional telehealth assistance.

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Your Telemedicine Questions, Answered

Please submit your questions through the Q&A box