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# Documenting Workflows

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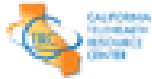


# NATIONAL CONSORTIUM OF TELEHEALTH RESOURCE CENTERS

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.

## Regionals

CTRC



gpTRAC



HTRC



MATRC



NETRC



NRTRC



PBTRC



SCTRC



SETRC



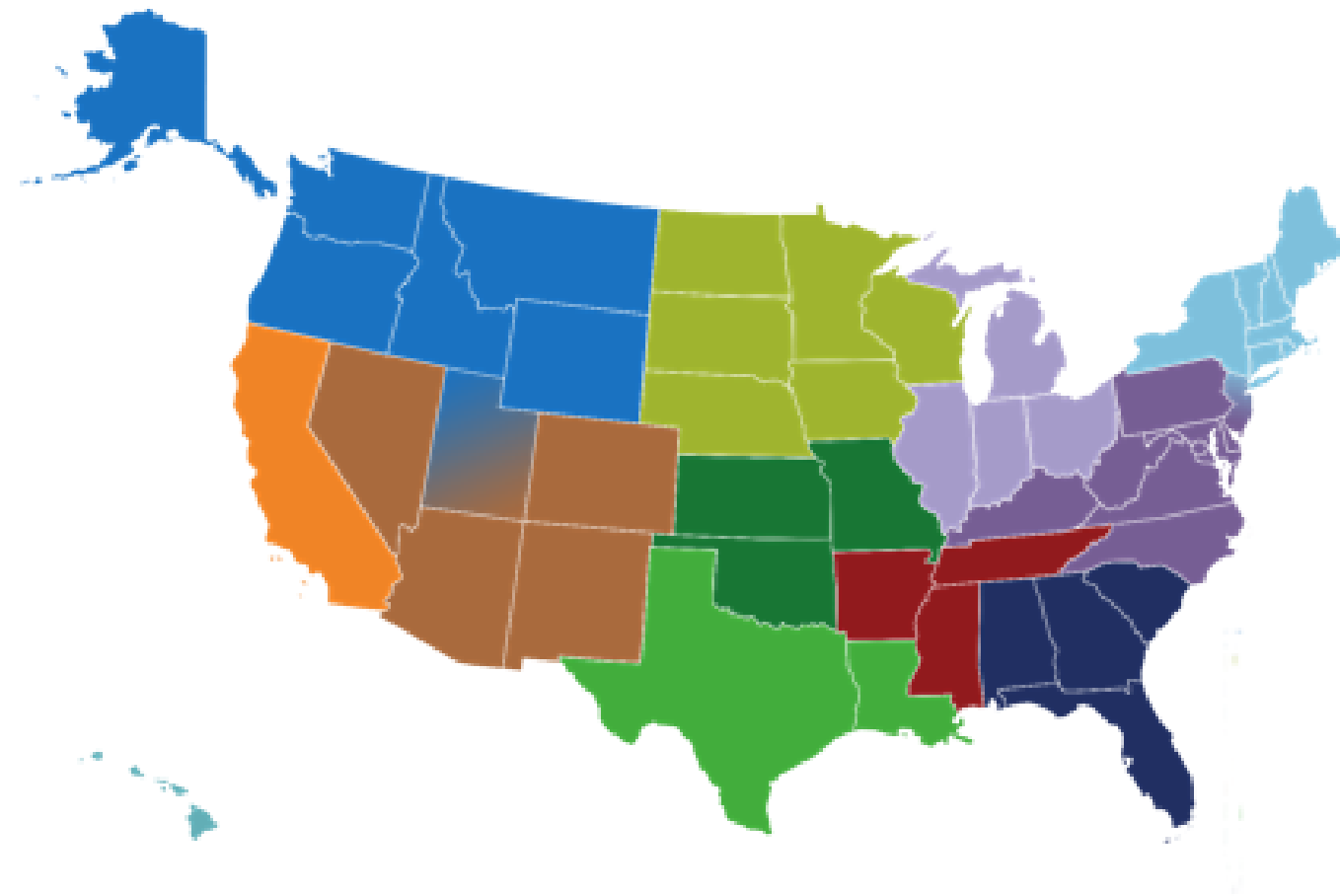
SWTRC



TexLa



UMTRC



## Nationals

CCHP



TTAC



# Poll Question #1

*Please answer using Zoom's polling function.*



# Poll Question #2

*Please answer using Zoom's polling function.*





# What is a Workflow?

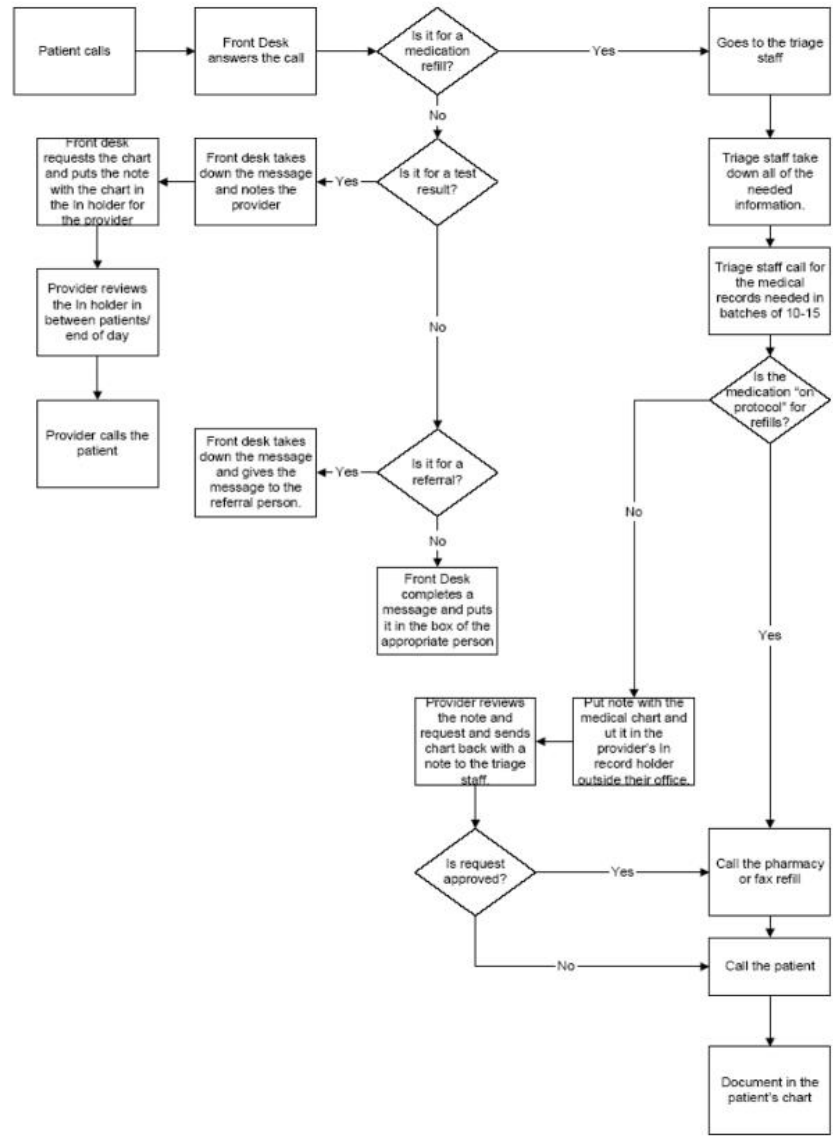
- A workflow is the **progression of steps or tasks** that make up a work process:
  - Physical and/or mental tasks
  - Performed by various people
  - Over time
  - Across roles, teams, or locations
- A **workflow map** shows a picture of who does what, and in which order
  - Tasks can be sequential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



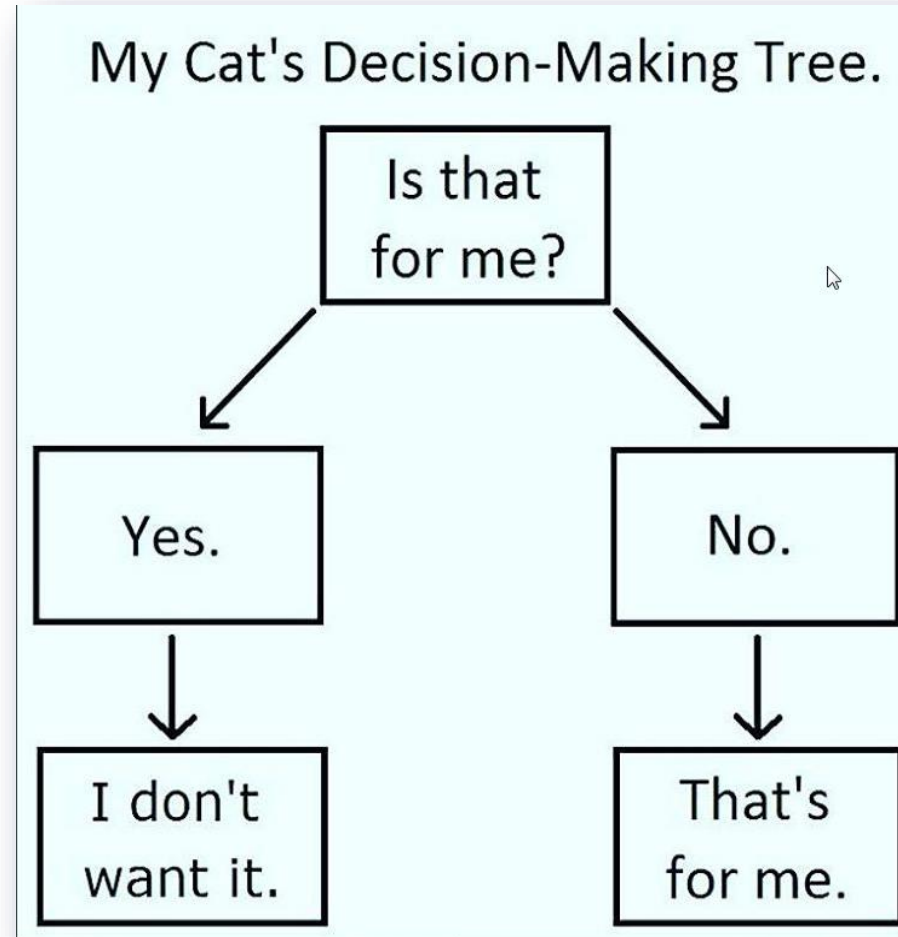
<https://healthit.ahrq.gov/health-it-tools-and-resources/workflow-assessment-health-it-toolkit/workflow>

# Example

## Current State Process Flowsheet: Incoming Calls

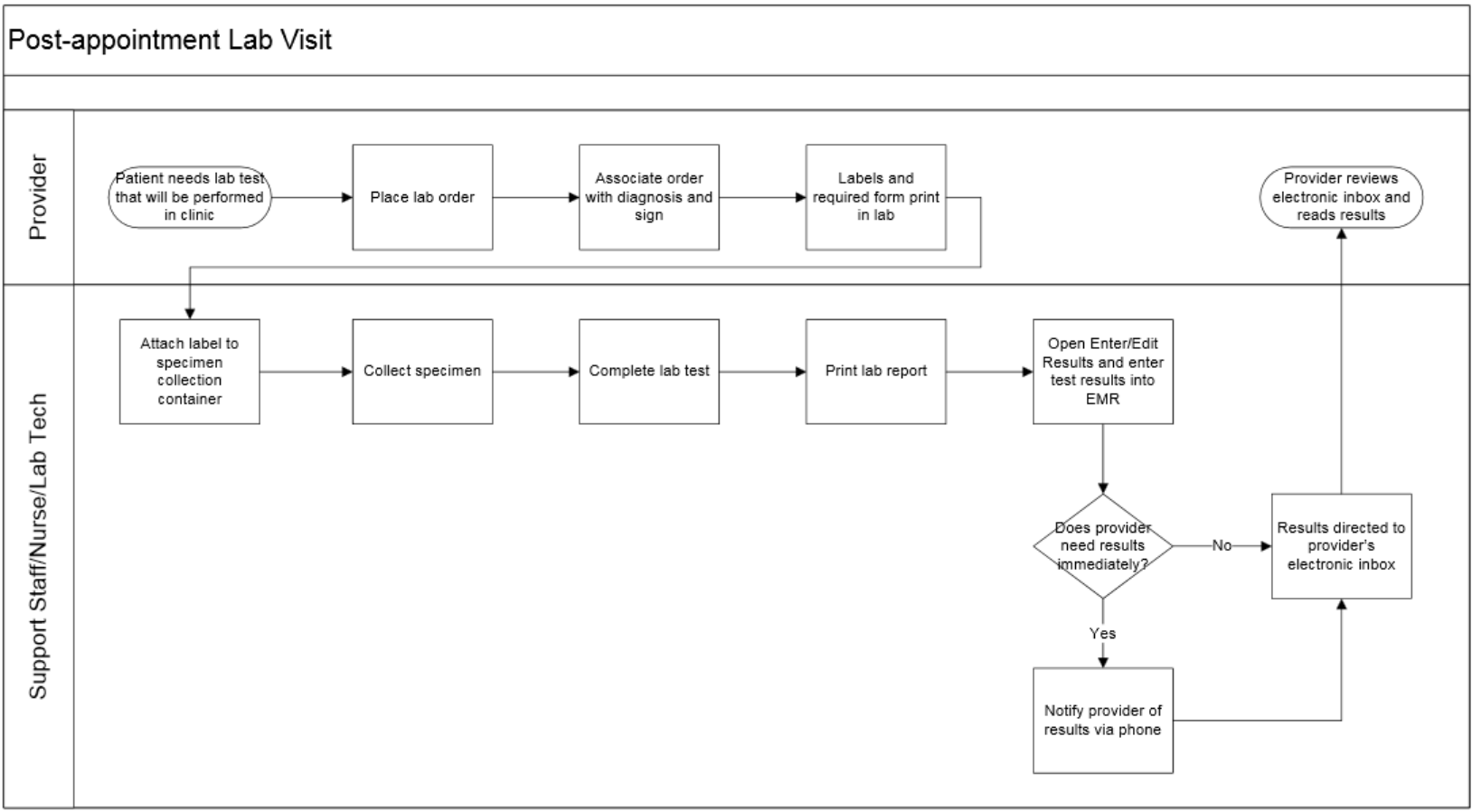


## Example





# Example

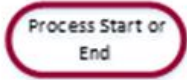








# Steps to Map a Workflow

- 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

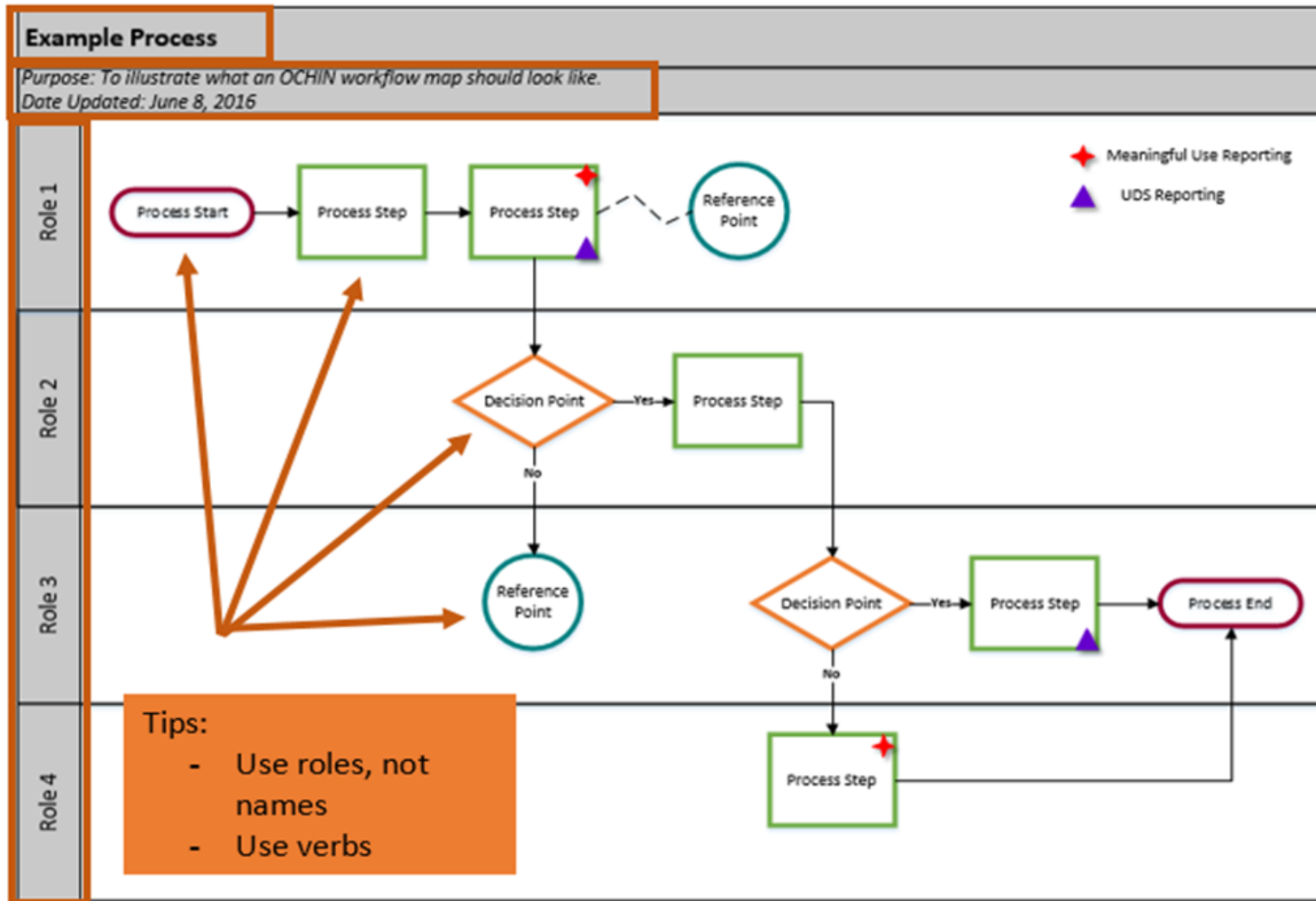


# Basic Workflow Map Symbols

 <p>Process Start or End</p>	Indicates the start and end points of a process	
 <p>Process Step</p>	A specific process step, task or activity that is preformed	
 <p>Decision Point</p>	A point in the process where a yes/no question is required	
 <p>Reference Point</p>	Indicates a reference or connection to another workflow	
 <p>Indicates Meaningful Use Reporting</p>	 <p>Indicates UDS Reporting</p>	 <p>Indicates a Reference Point that is not part of a Decision Point</p>



# Putting It All Together



# 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



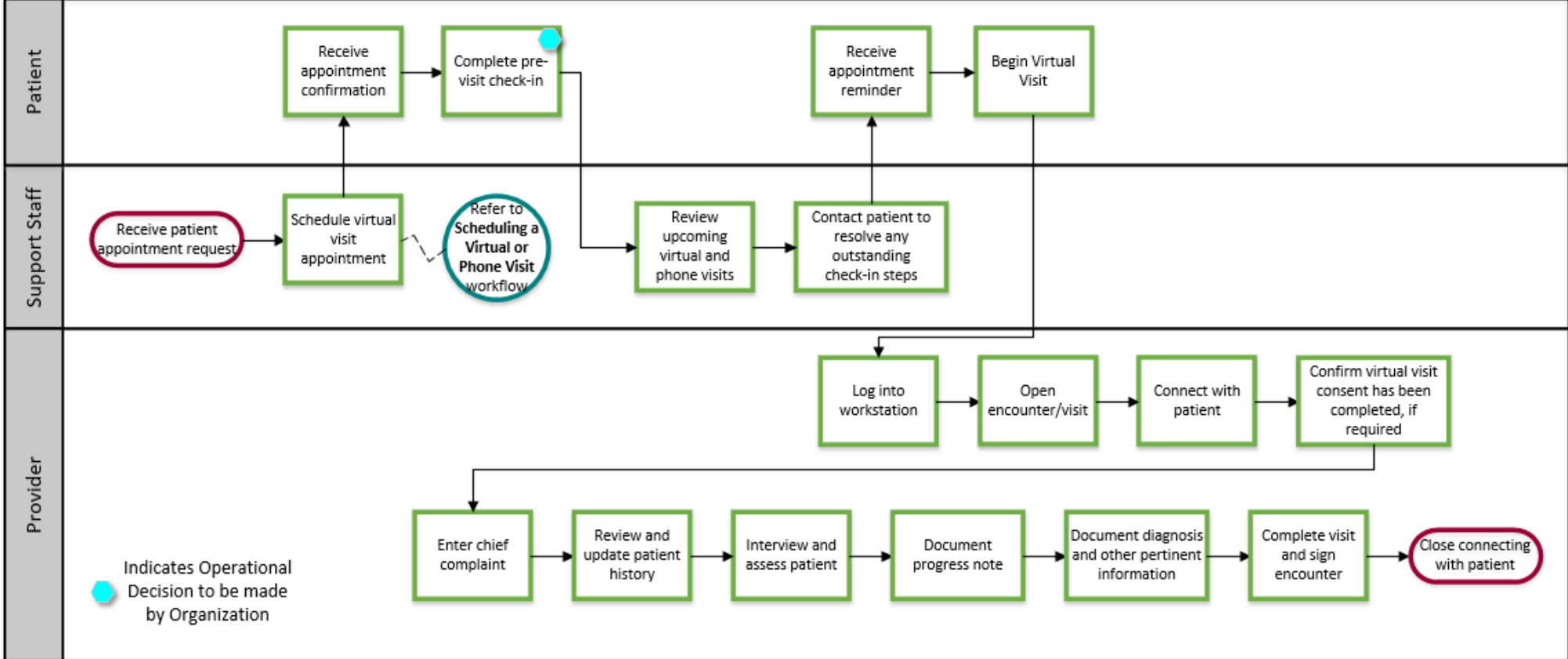
# Long-term Success Strategies

- 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 clinic to schedule a virtual visit and for a provider to complete the virtual visit.  
March 20, 2020



This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) under the grant number H2QCS30280 "Health Center Controlled Networks", through the use of funds from the total annual award of \$2,730,000.00. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by HRSA, HHS or the U.S. Government.

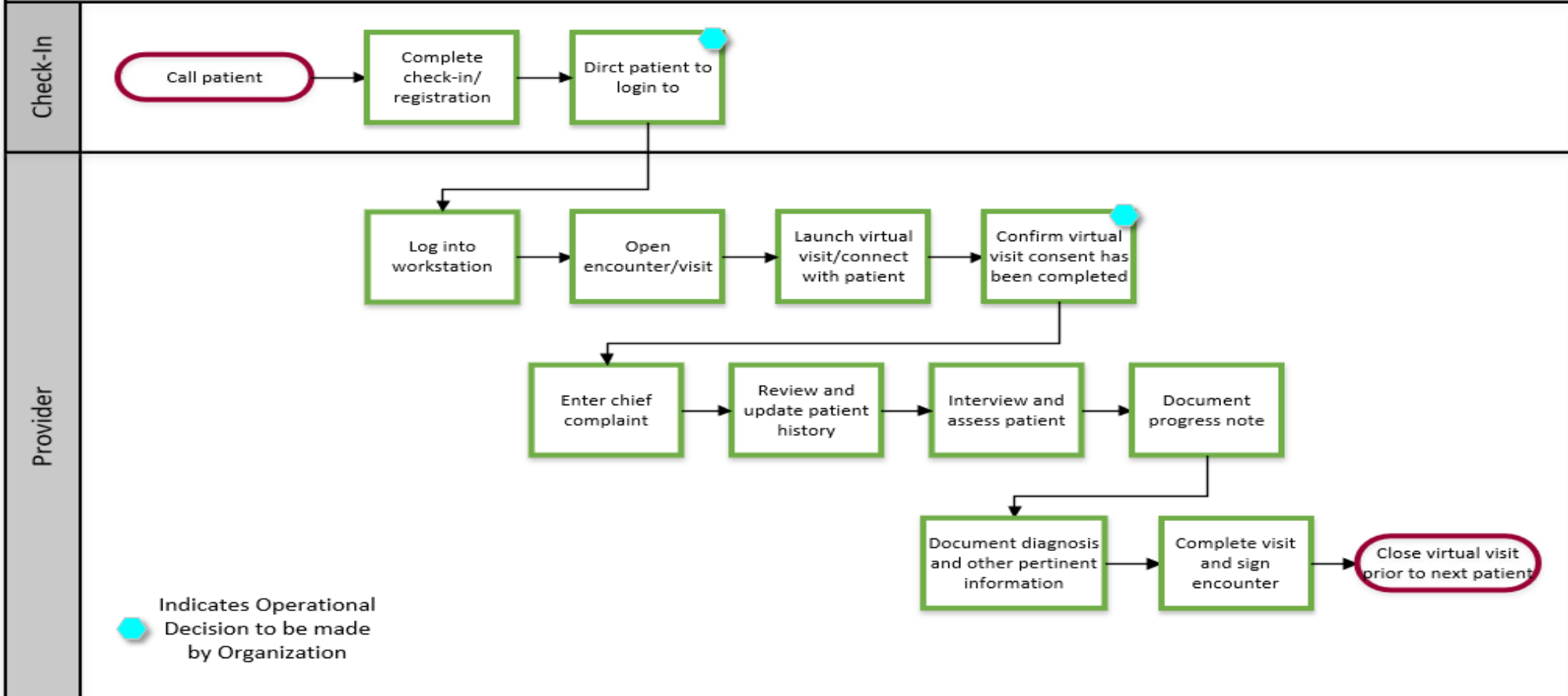


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## Conducting a Virtual Visit – Agnostic

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



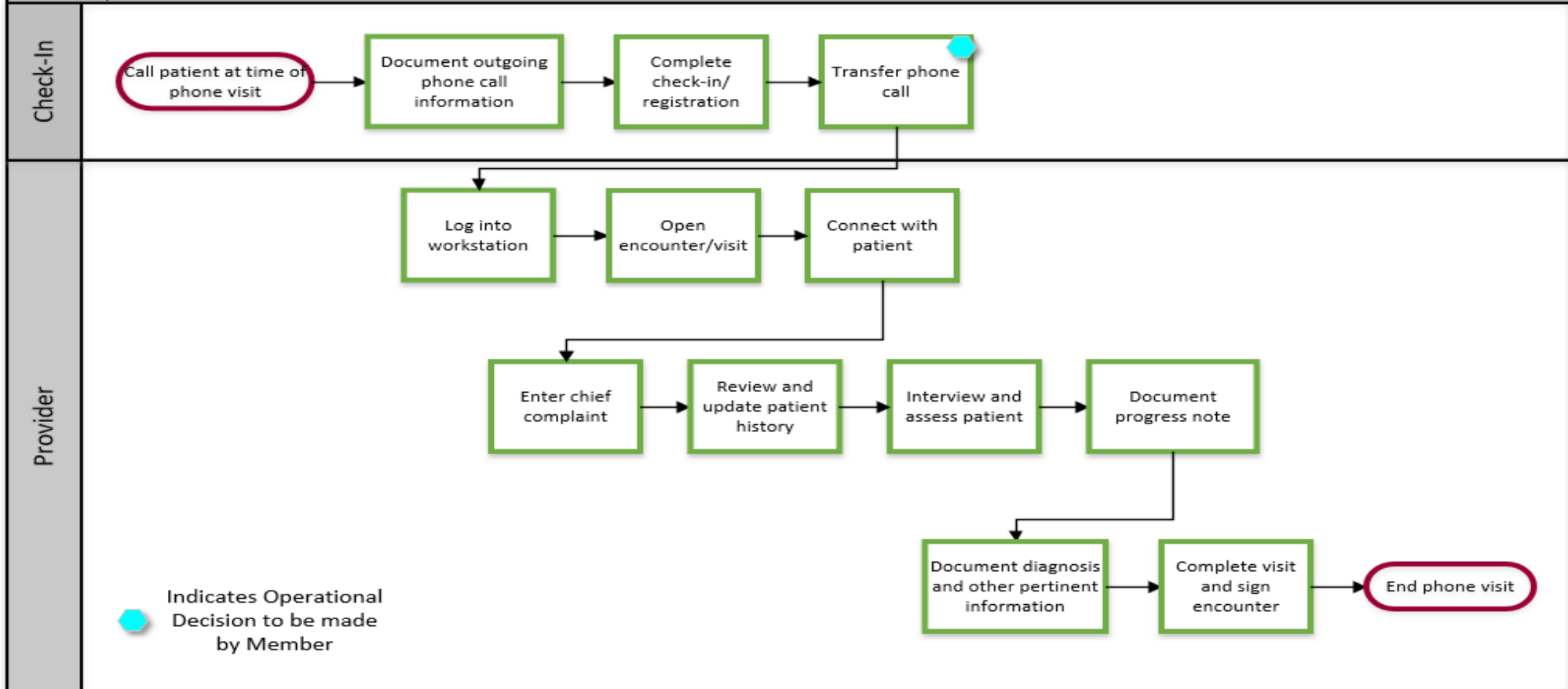
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## Conducting a Telephone Visit – Agnostic

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



This project is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) under the grant number H2QCS30280 "Health Center Controlled Networks", through the use of funds from the total annual award of \$2,730,000.00. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by HRSA, HHS or the U.S. Government.



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# Thank you!

*Please visit the National Consortium of Telehealth Resource Centers website at [www.telehealthresourcecenter.org](http://www.telehealthresourcecenter.org) for additional telehealth assistance.*

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# Your Telemedicine Questions, Answered

*Please submit your questions through the Q&A box*

