Physician Office Workflow and Process Change

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Presentation Goals

1. Understand the benefits of workflow change
2. Review common areas for change
3. Be able to identify and prioritize changes
4. How to document workflow activities
Why Think About Workflow?
Practice Processes

Interventions [IT & Redesign]
Financial/Admin Foundation
- Billing
- Registration
- Scheduling
Transactions
- ePrescribing
- Results Reporting
- Referral Management
Practice Workflow
- Practice Messaging & Orders
- Chart & Document Mgmt
- Clinical Documentation
Care
- Care Redesign
- Care Manager
- Patient Relationship Manager

Edmund Billings, M.D., Phyxe, Inc. 2004
<table>
<thead>
<tr>
<th>Practice Problem</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Results Tracking and Follow-up</td>
<td>67.1%</td>
</tr>
<tr>
<td>Phone and Fax Processing</td>
<td>54.3%</td>
</tr>
<tr>
<td>Medication Refills</td>
<td>53.9%</td>
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<tr>
<td>Inefficient Use of Resources</td>
<td>51.4%</td>
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<tr>
<td>Chart Chasing</td>
<td>50.0%</td>
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<tr>
<td>Unable to Stay on Office Schedule</td>
<td>48.6%</td>
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<tr>
<td>Patient Wait Times</td>
<td>47.1%</td>
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</tbody>
</table>

Based on top 5 workflow issues of California DOQ-IT practices (n = 82)
So What do We do About It?
### Know Your Processes - Practice Core and Supporting Processes Assessment:

Ask each member of the staff to rate the core and supporting processes using this worksheet. Based on these findings, staff members choose what to work on improving. Rate each process by putting a tic mark under the heading which most closely matches your understanding of the process. Also mark if the process is a source of patient complaints. (See Appendix, page A14-A16 for the Pareto worksheet and example to help you analyze the data.)

**Steps for Improvement:** Each of the processes below should be flowcharted in their current state. Explore improvements for each process based on the outcomes of the assessment tool. Once you have flowcharted the current state of your processes and determined your change ideas use the PDSA Cycle Worksheet on page 26 to run tests of change and to measure. The collection of flowcharts will create your Practice Playbook (see page 29).

<table>
<thead>
<tr>
<th>Processes</th>
<th>Works Well</th>
<th>Not a Problem</th>
<th>Small Problem</th>
<th>Real Problem</th>
<th>Totally Broken</th>
<th>Cannot Rate</th>
<th>We're Working On It</th>
<th>Source of Patient Complaint</th>
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<tbody>
<tr>
<td>Answering phones</td>
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<td>Appointment system</td>
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<td>Reporting diagnostic test results</td>
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<td>Prescription renewals</td>
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<td>Making referrals</td>
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<td>Pre-authorization for services</td>
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<td>Billing/Coding</td>
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<td>Assignment of patients to your practice</td>
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<td>Orientation of patients to your practice</td>
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<td>New patient work ups</td>
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<td>Education for patients/families</td>
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<td>Prevention assessment/activities</td>
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<td>Chronic disease management</td>
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Document Your Activities

- Survey and assess your practice system
  - Staff? Patients? External Services? Suppliers? Others?
- Involve representatives of your practice system
  - your staff, ancillary services, etc.
- Prioritize
- Select a process
- Flowchart the Process
- Select a Solution
<table>
<thead>
<tr>
<th>Icon</th>
<th>Definition</th>
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</thead>
<tbody>
<tr>
<td>START/END</td>
<td>Indicates where the workflow starts and where it terminates, for the purpose of the map</td>
</tr>
<tr>
<td>OPERATION</td>
<td>A specific task or activity that takes place from an expenditure of labor, a processing activity, or a combination of both.</td>
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<tr>
<td>DECISION POINT</td>
<td>A point within the flow of work in which a question must be answered to determine the next path or direction for the work.</td>
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<tr>
<td>DELAY</td>
<td>Indicates the work or product goes into a wait line or delay.</td>
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<tr>
<td>DIRECTION</td>
<td>Arrows indicate the direction of the flow of information</td>
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<tr>
<td>DOCUMENT</td>
<td>Data that can be read by people, such as printed output</td>
</tr>
<tr>
<td>CONNECTOR</td>
<td>Use this to create a cross-reference and hyperlink from a process on one page to a process on another page</td>
</tr>
<tr>
<td>ON-PAGE REFERENCE</td>
<td>Use this to create a cross-reference to another point on the same page</td>
</tr>
</tbody>
</table>
Prescription Renewal Process

**Front Office Staff**
- Start
- Rx Request
- Obtain Rx Information
- Obtain Patient Chart
- Attach Rx request/Place in Review Queue
- Schedule patient for Test/Visit
- Visit Test/ Result Received
- A

**MA/LVN**
- Rx Order in Chart?
  - Yes → Confirm patient, medication, dose, route,
  - No → Document Order Information
- Ensure Additional Information is Obtained
- Forward Rx Request/Chart to MD
- Follow-up with patient
- Generate Patient Education Sheet
- Transmit Authorized Rx to pharmacy
- Update Chart*

**Physician**
- Check for drug/ drug, age, allergy interactions
- Test/Visit required?
  - Yes → Write order
  - No → Authorization/ Signature?
    - Yes → Sign Rx
    - No → Further Practice Action
- End
Renewals Workflow

Pain Points in the Process
- Inbound calls, faxes or voice mail
- Chart pulls
- Stacks on desk
- Lunch, after-hours or in between
- Turnaround time
- Outbound calls, faxes or voice mail

Benefits of Automation
- Cut calls and faxes in
- Inbox of requests
- Creates Rx list
- Decouple chart pull
- Cut some chart pulls
- Frees MD from desk
- Cut turnaround time
- Cut calls, faxes out
Invoking Change

- Establish goals
- Understand your start and end points of your process
- Understand the ‘Current’ Process
  - Inputs, outputs, handoffs, pain points
- Understand the New Process
- Make the improvements (Manual & IT)
- Communicate to all
- Monitor how you are doing
Improve Workflow

- **Find and Remove Bottlenecks**
  - Identify constraints, exploited if possible, and removed if necessary

- **Move Steps in the Process Close Together**
  - Physical location of people and facilities can affect processing time and cause communication problems.

- **Use Synchronization**
  - By focusing on the flow of the patient through the process, each of the step can maximize efficiency.

- **Use Automation**
  - Processes can be improved by the intelligent use of automation (EHR).

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