

# Workflow Considerations

Workflow Area	Questions to Consider
<b>Miscellaneous Questions to Consider</b>	<ul style="list-style-type: none"> <li>Are tasks clearly defined by job responsibility?</li> <li>If not defined, would this be a good time to create this definition?</li> <li>Do your staff members understand workflow?</li> <li>Do you have workflow defined in a written format so that employees can refer to it, or is it ambiguous and exists with little definition?</li> <li>Have you prepared your employees for a shift in thinking regarding going from paper to electronic, records?</li> <li>Do employees understand that workflow from paper can be quite different in electronic format?</li> </ul>
<b>Messaging Questions to Consider</b>	<ul style="list-style-type: none"> <li>What is your current workflow and is it working?</li> <li>How will you move from paper notes/ messages to electronic?</li> <li>In paper when a message is complete, what do you do with the paper?</li> <li>Do you want messages recorded in the Progress Notes Section of the chart, or do you want to define a new chart section?</li> </ul>
<b>Vitals Workflow Questions to Consider</b>	<ul style="list-style-type: none"> <li>How will nurses enter vitals into the chart</li> <li>Do you want to record historical vitals in the chart, and if so, when will this be done? Ahead of training or after?</li> <li>Proper methods for entering vitals (i.e. 5'6" or 5ft 6in.)</li> </ul>
<b>Nurse Note Workflow Questions to Consider</b>	<ul style="list-style-type: none"> <li>Will the nurse only be using Nurse notes?</li> <li>Will the nurse need a special immunizations template setup ahead of time?</li> <li>Do you need to add new immunizations to the pick list?</li> <li>Will you need to modify the Nurse Telephone Template to meet the needs of your practice?</li> </ul>
<b>Paper Workflow Questions to Consider</b>	<ul style="list-style-type: none"> <li>Can you speak to your 3rd party organizations (i.e. Hospitals, nursing homes, etc.) about getting your documents pushed to you in an electronic format?</li> <li>Have you included transcriptionists in the overall workflow?</li> </ul>
<b>Laboratory Workflow Questions to Consider</b>	<p>If no interface, have you identified who will enter the labs into the chart?</p> <ul style="list-style-type: none"> <li>If using an interface, have you identified what non-interfaced labs will still need to be entered by hand?</li> <li>Have you thought about what parts of the labs you would like sent to the providers review bin?</li> <li>If labs are critical (high or low), do you want to be notified through messaging?</li> </ul>
<b>History Workflow Questions to Consider</b>	<ul style="list-style-type: none"> <li>Who will enter the Past Medical History?</li> <li>Who will enter the Family History?</li> <li>Who will enter the Social History?</li> <li>Do you want the history sections to be blank, or do you want to use pre-defined templates?</li> <li>Who will enter the histories, the nurse or the physician?</li> <li>Do you understand that when you enter info, you have the chance of modifying the existing histories and adding to or appending?</li> </ul>
<b>Existing Paper Charts Workflow Questions to Consider</b>	<ul style="list-style-type: none"> <li>How will you transition from paper to EHR?</li> <li>What parts of the chart will you want to be converted to EHR?</li> <li>Have you identified for your staff how to know if a chart has been changed to EHR so that next time the patient comes in, your staff knows to look for it on the shelf, or in the EHR?</li> <li>What about a stamp that could be placed on the chart to identify that it is now electronic, i.e. a large red letter <b>E</b></li> <li>Have you thought about what to do with the paper chart once it is entered into EHR?</li> </ul>
<b>Pre-Training Workflow Questions to Consider</b>	<ul style="list-style-type: none"> <li>Is your staff familiar enough with Windows and your current systems that these issues will not slow down the EHR training?</li> <li>Have all LOGINS, USER NAMES and PASSWORDS been pre-established, written down, and practiced prior to the training?</li> <li>Do users know how to properly exit windows? Do they know how to properly exit the EHR?</li> <li>Do they know who to call for internal technical support issues?</li> <li>Has the staff been notified that during the training, there will be a lot of topics to cover, but will be learned over time?</li> </ul>