

# CPD ECOACH

## SAMPLE RESPONSE – OFFICE WORKFLOW

### STEP 1: DEFINE YOUR TOPIC

#### IDENTIFICATION

What area(s) of your practice would you like to shine a light on?

Improving office workflow and efficiencies

#### REFLECTION

Think back to a recent patient encounter (or other practice-related concern) that represents, or has elements of, that particular area of practice. This can be an encounter with a particular patient, an aspect of your encounter with several patients or a feature of your day to day practice as a physician.

a) Briefly summarize the situation.

We have been having some challenges with the staff. The communication between the physicians and the MOAs/office staff hasn't been great. The staff is unhappy with the office manager and feels that she is bossing them around and always being critical. The Office Manager thinks that the staff are being lazy and not working to their potential. The physicians are feeling like small jobs are not being done that would improve the workflow and make their lives easier. For example, patients arrive for appointments and pull out Driver Medical forms to be filled in when they are seeing the doctor. This disrupts the patient visit when the visual exam must be done and other tasks done in order for the form to be properly filled. Also, the staff finds that each doctor has a different way of wanting certain things done, like having weights and BPs done before or after, by staff or by physicians. It all makes the office chaotic!

b) What specifically would you like to improve?

*Define your goal/aim/improvement that you want to make.*

I want to improve workflow and communication between the staff so we can serve patients more efficiently.

Time spent completing Step 1 (in hours): **0.25**

***Proceed to Step 2 to complete the self-directed assessment using external feedback.***

### STEP 2: SELF-DIRECTED ASSESSMENT: EXTERNAL FEEDBACK

#### STEP 2A: CREATING AN INFORMATION-GATHERING STRATEGY

a) What can you measure that is specific and would help you assess how you are currently doing with respect to your topic?

List one or more things that you would find useful to measure.

i. Level of staff satisfaction with office workflow

ii. Patient experience of administrative processes

- b) After considering the different types of information sources, you may find that you need to refine the measures you listed previously. Did you refine your list of things to measure?  
No
- c) Which information source(s) have you decided on?  
I've decided to use information from our staff survey and patient feedback. My office conducts a quarterly staff survey that is submitted anonymously. We also ask patients to complete an optional feedback form after each visit.
- d) How will you gather the information you need?  
*Describe your information-gathering strategy. If you are using an EMR, what queries will you run on your EMR? If you are using other existing information sources, what are the sources and how will you get the information from those sources? If you are creating your own information sources, how will you go about the process?*  
The completed forms are stored in a filing cabinet in the office. With the assistance of the office manager, I will go over the forms and identify any comments/entries related to workflow management, efficiency and/or satisfaction.
- e) How would you predict the answer to your question on your topic will be? (This is asking you to predict what you will discover based on the information you will gather!)  
I expect the level of satisfaction with office workflow reported by staff to be low. There will probably be specific instances of poor workflow or inefficiency identified by staff. I don't expect to find a lot of negative comments or concerns from the patient feedback.

***With your information-gathering strategy now firmly in place, you can proceed with gathering the information you need. Remember that some projects may be new and not have a baseline; if this is the case, feel free to skip Step 2B.***

## **STEP 2B: GATHERING THE INFORMATION**

- f) When you've completed your information gathering exercise, summarize your findings.  
*Were your findings different from what you predicted?*  
The number of completed staff survey and patient feedback form was less than I expected. 33% (1 out of 3) of staff members who completed the last two quarterly surveys indicated they were unsatisfied or had any concerns with office workflow. On the other hand, there were a lot more comments from patients on challenges experienced with the office's administrative process than I anticipated. This means patient experience is being affected negatively in a greater way than I thought.
- g) With the information you've gleaned so far, what have you discovered?  
It appears staff members were more comfortable talking about the concerns they had than putting them down in the staff survey. The high number of comments from patients around challenges experienced indicates workflow is a high priority area that needs to be addressed. We should also probably make a plan to look at the patient feedback forms more regularly so we can identify areas for improvement faster.

Time spent completing Step 2 (in hours): **1.5**

*Congratulations! Completing this process has provided you with a robust assessment of how you are doing in the area that you have identified. You have also increased your comfort level and picked up a few skills for finding information for a self-directed assessment by getting to this stage. Celebrate this milestone and consider sharing your findings or lessons learned with your colleagues and co-workers.*

*Now what? Proceed to Step 3 to develop an action plan for becoming the best you can be in this area of practice.*

### STEP 3: CREATE A PLAN FOR IMPROVEMENT

The first requirement for creating your improvement plan is to determine what the ideal state is.

- a) What are best practices in your chosen topic, if applicable?  
 Having a workflow plan and a communication channel improves office efficiency and team work which in turn, improves the quality of care provided and patient experience. Team huddles have been shown to improve office efficiency and teamwork  
<http://www.aafp.org/fpm/2007/0600/p27.html>

- b) Based on the best practices you have identified and the information you gathered regarding your current practice, where would you ideally like to be in dealing with the issue? What place would you like to reach in dealing with your topic?  
 I would like to have a weekly team huddle in our office on a day that allows the best possible attendance by staff and physicians, for 15 minutes. The purpose of the weekly team huddle will be to work on a workflow plan for the office as a team for the office and open up a communication channel for staff. Having a weekly team huddle will ensure we are able to adjust the plan as needed based on ongoing feedback received from staff and patients. We will develop our huddle framework by using the suggestions in the document above.

- c) Define your goal(s). What does success look like to you?  
 You identified a goal/aim in Step 1. This is an opportunity to further refine your goal. We recommend a maximum of two goals so the tasks do not become too daunting or unmanageable.  
 By the end of the month, we will have developed a schedule for a weekly team huddle to help improve office workflow and communication between staff.

*Now that you have defined your goal(s), create your action plan. Making your goal S.M.A.R.T would have given you the raw material needed for this exercise.*

d) Action plan

Action Steps	Deadline	Resources/ Supports	Potential Challenges	Evidence of Success
Plan a weekly office huddle day, time, duration	1 week (January 7, 2017)	Meetings with physicians and staff	Won't get buy in or find a day that works for huddle	Weekly huddle is scheduled

Develop a plan for improving an office/practice issue/opportunity at each huddle	2 weeks (January 14, 2017)	MOA Office Manger Physicians	No consensus on a plan at a huddle	Plan documented at end of each weekly huddle
Document the huddle plan and the outcomes to report at next scheduled huddle	Every week from January 14, 2017 to (January 31, 2017)	MOA Office Manager Physicians Notebook to document plan and record measures decided on	Plan not documented or measured	Weekly report on how the plan was implemented and continued, with measures to show whether there was improvement

e) Which CanMEDS-FM role(s) does your goal(s) fit under? Please select all that apply.

	<i>CanMEDS Role</i>	<i>Description</i>
X	Collaborator	<i>Works with patients, families, healthcare teams, other health professionals, and communities to achieve optimal patient care.</i>
X	Communicator	<i>Facilitates the doctor-patient relationship and the dynamic exchanges that occur before, during, and after the medical encounter.</i>
	Family Medicine Expert	<i>Provides comprehensive, continuing care to patients and their families within a relationship of trust.</i>
	Health Advocate	<i>Responsibly uses expertise and influence to advance the health and well-being of individual patients, communities, and populations.</i>
X	Professional	<i>Committed to the health and well-being of individuals and society through ethical practice, profession-led regulation, and high personal standards of behaviour.</i>
	Scholar	<i>Demonstrates a lifelong commitment to reflective learning, as well as the creation, dissemination, application and translation of knowledge.</i>
	Leader/Manager	<i>Uses resources wisely and organizes practices which are a resource to their patient population to sustain and improve health, coordinating care within the other members of the health care system.</i>

f) How confident do you feel about following through on your plan (on a scale from 0 to 10 with 10 being very confident)? 8

Time spent completing Step 3 (in hours): 1

***Phew! Well done on creating and committing to a workable action plan. Set up reminder notifications in your calendar based on the deadlines you decided on.***

*Go ahead and implement your plan! The final step, which is to be completed after you have implemented your plan, will help you assess how well your implementation worked.*

## **STEP 4: EVALUATE THE IMPLEMENTATION**

This is the last step and should be completed after you have implemented your improvement plan.

If possible, gather post-implementation information using the same measure(s) and process you identified in Step 2 (Self-directed assessment: external feedback). If applicable, compare the pre-implementation and post-implementation information from your practice to assess the impact of your improvement activities.

- a) Did you observe any changes?

Yes

- b) What was the extent of the change?

We decide on a regularly scheduled office huddle on Thursday at 0830 for 15 minutes. We did this four Thursdays in a row.  $\frac{3}{4}$  staff members attended each huddle (one was not working Thursday mornings and was informed of the weekly plan on Friday – she gave input by suggestions to the office manager). All three doctors in the office attended 3 of the 4 huddles, only two were at the 2<sup>nd</sup> huddle. We implemented three plans at the 1<sup>st</sup>, 3<sup>rd</sup> and 4<sup>th</sup> huddle (the 2<sup>nd</sup> huddle just continued the previous week’s plan with a bit of tweaking).

The implementations brought about some successful practice improvements:

- i. One related to getting up to date demographics on each patient phoning in or showing up at an appointment if their demographics weren’t current in the last year.
- ii. The second huddle plan was for the staff to ask patients if they had any forms that needed to be filled when the appointment was made and when they presented to the office, to put a demographic label on the forms as appropriate.
- iii. The last huddle plan was to rotate staff doing the phone answering, exam room clean-up and patient delivery to the exam room daily.

We will continue our weekly huddles and may have some plan for measurement/evaluation go on longer than 1 week. We need to follow up on old plans to make sure that they are sustained. We need ongoing measurement/evaluation for each practice change.

- c) Did you encounter unanticipated challenges or barriers while implementing your improvement plan?

Yes

- d) What were the challenges and how did you manage them?

We realized that we won’t be able to have everyone at every huddle and we need to have a good communication plan to keep everyone informed and feel part of the process. We will have a whiteboard with the week’s plan posted in the coffee room with a suggestion box under it to collect suggestions for huddle plans. We will keep a notebook with a pen

attached to document daily how the plan is going, either with measurement, comments or both.

Ongoing measurement and evaluation of each office/practice change is key for sustaining improvements. We will also keep track on the whiteboard of how we are doing with sustaining “old huddle plans.”

***Reflect on a patient encounter (or other practice-related scenario) that occurred after you completed your improvement plan that was similar to the one that previously made you feel challenged or uncomfortable.***

e) Has there been a change in your comfort level?

Yes

f) Describe the change(s).

The office staff is happy with the huddles. They report a sense of a “common cause” and like tackling one thing at a time. Physicians have noticed a happier office and staff trying to be involved in improving the office workflow.

g) Are there any other steps you can take to increase your comfort/confidence level? Please describe.

No. I will continue doing this.

h) The overall learning objectives for this self-directed assessment tool are listed below. Please **select all** the learning objectives you felt were addressed through this self-directed assessment process.

- X Reflect on an area of practice where you feel challenged or uncomfortable
- X Identify available sources of information for conducting a self-directed assessment
- X Formulate an action plan for practice/quality improvement
- X Determine the effectiveness of a practice/quality improvement plan
- X Describe how to use health data or information for practice improvement

Time spent completing Step 4 (in hours): 2

***Great job on completing the final step! You may use this tool in an iterative improvement process for the topic or area of practice you identified and for as many different scenarios or topics as you like.***

**Total time spent on Steps 1 to 4 (in hours): 4.75**

**Mainpro+ credits earned: 14.25**