

# Workflow Analysis

One-Stop Shopping



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HEALTHCARE MANAGEMENT CONSULTANTS

# Presentation Agenda

- Impetus for an IT Solution
- Return on Investment
- Workflow Analysis
  - Buy-in
  - Change Management
  - Standardization
  - Design/Build/Validate
  - Policy and Procedure Development
  - Training
  - Auditing
- Revisit ROI
- Quality Improvement
- Successful Workflow Analysis Methodology



# Impetus for an IT Solution

- Identify common goals/vision for the EMR/application
- Identify external impetus
  - HIPAA/Security Issues
  - Political
    - President Bush - interoperable Electronic Health Records within 10 years
  - Public Health
    - Pt. Safety
    - Disease Management
  - Societal
    - Knowledgeable
    - Thirsty for knowledge



# Impetus for an IT Solution

- Identify internal forces
  - Economic
    - Efficiency
    - Higher reimbursement
      - proper coding
      - pay for performance
  - Liability
    - Proper documentation
    - Decision support
    - Handwriting issues
  - Incentives
    - Reduce risk of adverse drug interactions
    - Apply standards of care to disease management
    - Promote preventive health
    - Facilitate communication between patient and providers
    - Promote health education



# Impetus for an IT Solution

It is essential that the new workflows implement both current best care practice and the organization's strategic objectives

Start with the end in mind!



# Return on Investment (ROI)

- Functionality eliminating or reducing paper handling
- Functionality to reduce phone calls
  - Patients
  - Departments – radiology, lab, pharmacy, nursing, etc.
  - Consults
  - Physicians
- Automated tasks lists
- Order entry
- ePrescribing
- Electronic lab and radiology results
- Chart pulls

***Because the EMR functions best when operational efficiencies are realized, some of the cost associated with EMR implementations are directly attributed to process improvement.***







**Let's Go Shopping!!!**



# Create Buy-In



- Inclusion in the process
  - “Ask” Providers/end users how they do their day to day tasks
  - Opportunity to discuss issues/concerns
    - Identify champions
    - Identify naysayer’s
  - Ensure no clinically necessary steps are omitted

# Change Management



- Change should not occur solely for the sake of change
- Workflow can show that current methods and processes are:
  - Burdensome
  - Error prone
  - Do not advance organizational goals
- Use the workflow interviews to provide awareness
  - Implementation process
  - Revisit the organization's vision/goals
  - Revisit the ROI
  - WIIFM
  - Set up reasonable expectations

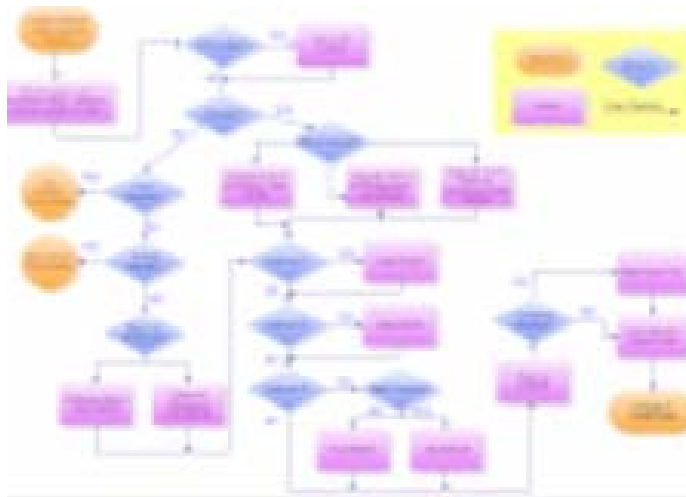
Workflow provides an opportunity to show why change is needed...



# Standardization



- More is not better!!!



- Changing workflow can be like asking a left handed person to become a right handed person.

# Design/Build/Validate



- **Current state workflow**
  - Standardized
  - Work within the application (happy medium)
- **Future state workflow (used in application)**
  - Use for all DBV processes
  - Existing flow sheets need to be reworked and optimized with workflow needs in mind
  - Design flexible processes
  - Perform work where it makes the most sense



# Policy & Procedure Development



- Workflows are your procedure
- Build policies around the workflow
- Narrative and Visio

# Training



- Foreign versus familiar
- Role based training
- Scenario driven guides
- Revisit workflow at the elbow

# Auditing



- Data must exist in the system before it can be communicated
- Identify areas of non-compliance
- Complete trending reports
- Compare deficiencies with workflow to determine if changes are necessary

# Revisit ROI



- Measure results
- Compare to metrics prior to the implementation
- Do not trust gut instinct
- Correct deficiencies
  - Revisit workflows for flaws
- Rally in successes



# Quality Improvement

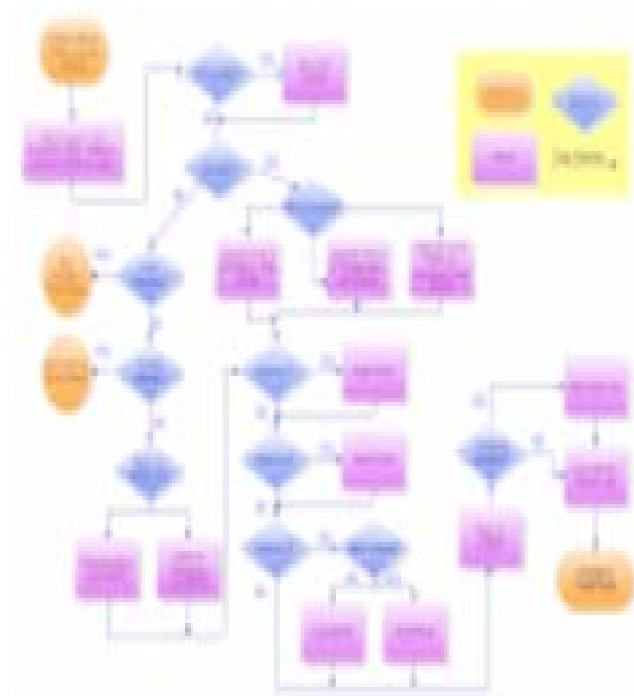


- Continuous improvement is necessary to achieve your goals
- Develop a quality management oversight that involves early identification and correction of flaws
- Identify root cause analysis
  - Training
  - Workflow
  - Application issue
- Revisit workflows for necessary redesign



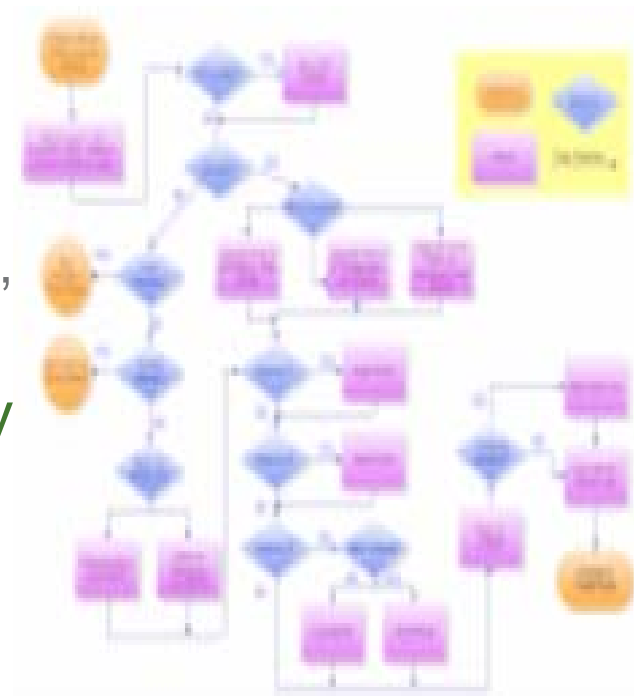
# Successful Workflow Analysis Methodology

- Conducted by someone who is:
  - Close enough to the clinical work flow to be considered reliable
  - Far enough removed to be objective and pinpoint potential changes of value
- Interviews
  - Know the right questions to ask
  - Listen don't direct
  - Delve into the details



# Successful Workflow Analysis Methodology

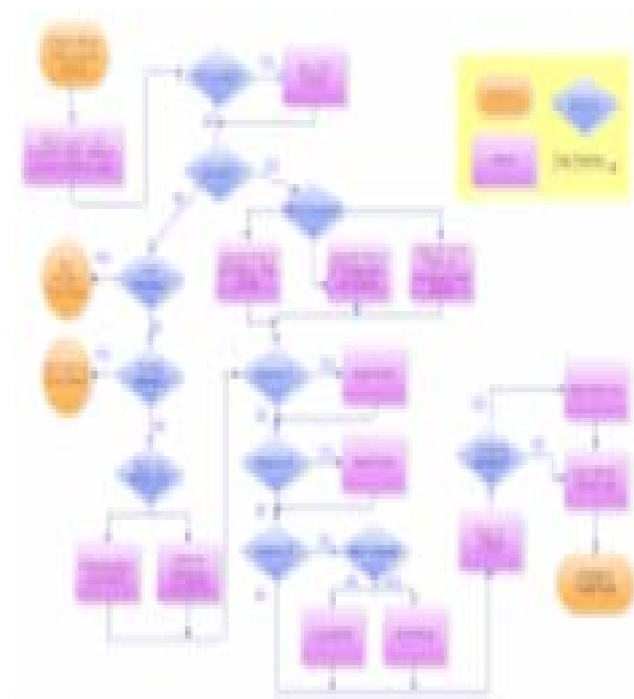
- It is essential to also collect the flow of people
  - ED to Nursing unit, to OR, to Recovery, to ICU, to Case Managers, to Physical Therapy, discharge planners, etc.
- Clearly identify all order entry functions and results determination
- Review documents, flow sheets, policies and procedures



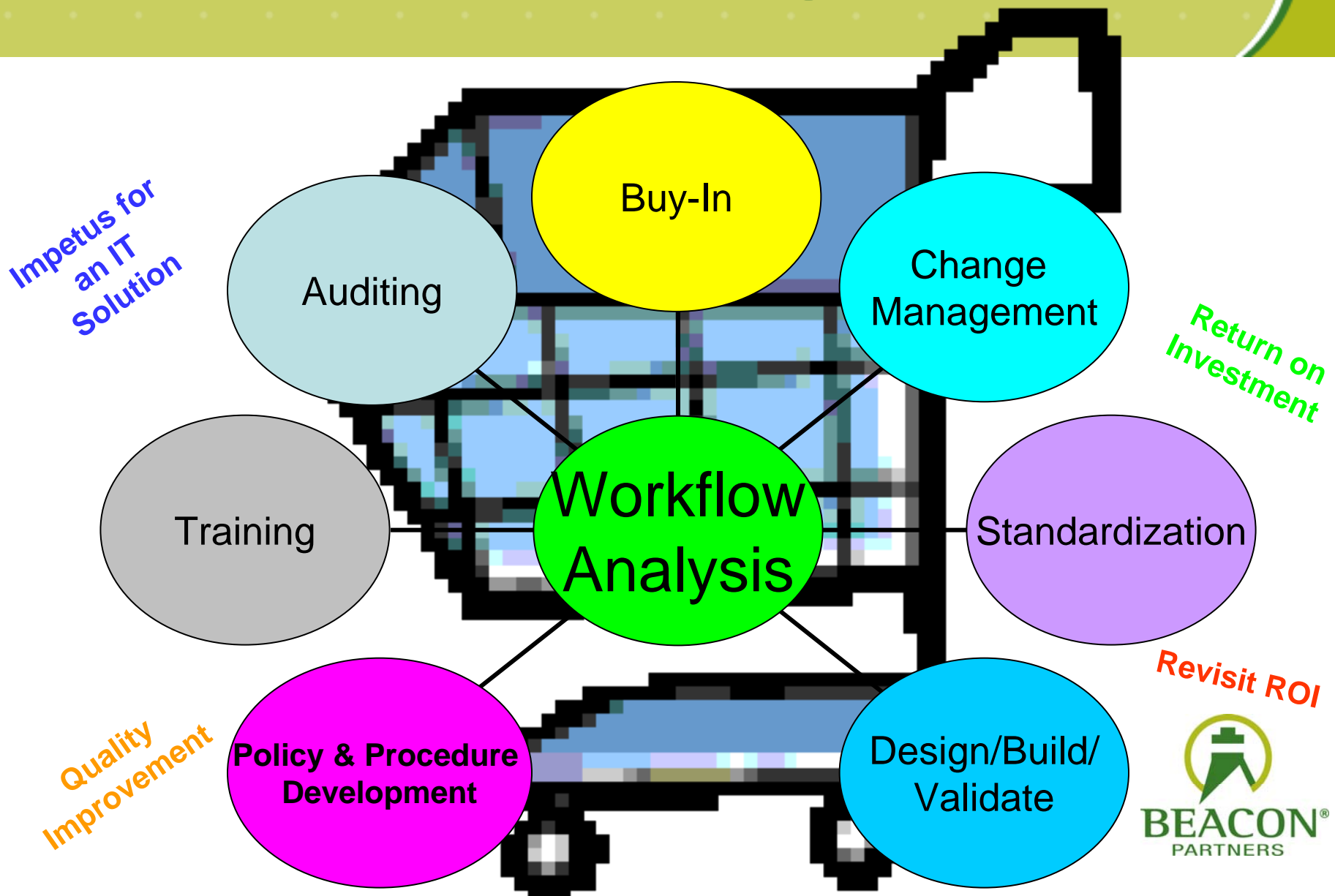
# Successful Workflow Analysis Methodology

- Observe tasks for additional detail
- Observe the architect and infrastructure
- Do not rely on only one subject matter expert
- Take the patient perspective
- Write out steps and draw out the workflow - Visio
- Present to interviewees for validation
- Revise as needed

***Use the workflow!!!***



# One-Stop Shopping



# Maximize Your Efforts



# Thank You

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