

## Work Flow Assessment Checklist

| Scheduling   |  |
|--|--|
| How are appointments made?<br>Phone in advance<br>Phone for same day appointment<br>Previous visit   |  |
| Does anything happen between the time an appointment is made and the patient arrives?<br>Cancellation<br>Rescheduling                                      |  |
| Do you do reminders?<br>Calls<br>Letters/cards<br>Does your system generate reminders?<br>Do you send forms to the patient to complete before their visit? |  |
| What do you do to prepare for the next day's appointments?<br>What about work-ins?<br>Do you get walk-in patients?   |  |
| Who pulls the chart?<br>Regular appointments<br>Same day appointments/nurse visits<br>Phone calls  |  |
| When the chart is pulled do you check for outstanding labs, missing consults, etc.?<br>What do you do if something is missing?                             | (By alerting pt./MD of missing information upstream, time and unnecessary visits can be saved) |

|   |  |
|---|--|
| Where do you put the next day's charts?<br>What do you do if you can't find them? |  |
|---|--|

**Scheduling - continued**

|                         |
|-------------------------|
| Is there anything else? |
|-------------------------|

|                                |
|--------------------------------|
| Add additional questions here: |
|--------------------------------|

**Patient Arrives (or not)**

|  |                                |
|--|--------------------------------|
| What do you do about no-shows?<br>Is there a standard process?<br>What do you do with the chart? | Policy vs. what really happens |
|--|--------------------------------|

|  |  |
|--|--|
| What is your check-in process?<br>Information verification (how)<br>Papers the patient must sign<br>What is done with signed forms?<br>Do you add forms to the chart before putting it up for the MA?<br>(Can we get copies of the forms you use routinely?)<br>What do you do with papers the patient brings in, e.g., driver license, PE, etc.?<br>What forms (e.g., DOT, etc.) do you have on hand?<br>Are any electronic? Which?<br>Would you like to have forms electronically? |  |
|--|--|

|   |  |
|---|--|
| How do you let the MA know the patient is ready to be seen (patient and paperwork are ready)? |  |
|---|--|

|  |  |
|--|--|
| Do you do things differently for any of the MAs? |  |
|--|--|

|                         |
|-------------------------|
| Is there anything else? |
|-------------------------|

Add additional questions here:

### Patient Visit: MA

MA picks up the chart and calls patient back

MA begins visit

Weight

Vitals

Review medications

Other (e.g., foot exam, UA, strep screen, procedure set up)

Where is this done?

Where is this done?

What does the MA document?

How does the MA notify the MD the patient is ready and which is the next room?

Chart in door

Walkie-talkie

Whiteboard

Is there any communication between the MA and the MD other than that the patient is ready to be seen?

Face-to-face

Walkie-talkie

Sticky note on the chart

Whiteboard

What type of information is communicated?

Are there variations between MAs, between MA & provider?

Is there anything else?

[Add additional questions here:](#)

## Exam

MD does exam

What does MD do if he needs something or needs the MA during visit?

Lab

Equipment

Assistance with exam

Does the MA keep the MD on schedule? How?

What is the process when a patient has to leave the room for lab, x-ray, etc. and then comes back?

Visit documentation

MD

MA

Does MA put anything else in the chart after the patient leaves?

Is there anything else?

[Add additional questions here:](#)

## End of visit

When is the visit documentation completed?

As the visit concludes

Immediately after the visit in the nursing station

Between visits, when the MD has time

At the end of the day

Days/weeks later

Usually within \_\_\_\_\_ hours/days

|   |  |
|---|--|
| <p>Is there variability between providers in the time it takes to complete the chart?</p>   |  |
| <p><b>End of visit – cont.</b></p>  |  |
| <p>What happens to the chart?<br/>         Goes with patient to check out<br/>         Goes to the doctors office<br/>         Sits in the work area for MD to work on as he has time<br/>         Other</p>                            |  |
| <p>Superbill<br/>         Who documents on the superbill?<br/>         Where does it go at the end of the visit?<br/>         How does it get there?</p>  |  |
| <p>What are the steps until a bill is dropped?<br/>         Coders<br/>             Do they have the information they need?<br/>             How do they get their questions answered?<br/>         Data entry<br/>         Billers</p> |  |
| <p>Is there anything else?</p>  |  |
| <p><a href="#">Add additional questions he</a></p>  |  |

|  |  |
|--|--|
| <p><b>Prescriptions</b></p>  |  |
| <p>Does the MD ask if refills are needed?<br/>         If Rx needs to be written, do they have Rx pad, or do they have to leave the room?<br/>         How are they handled?<br/>             Written and given to patient<br/>             Fax<br/>             Other</p> |  |
| <p>Is there anything else?</p>   |  |

[Add additional questions here:](#)

## Lab

In house (describe the process)

Outside (describe the process)

Hospital

LabCorp

Quest

How are lab results returned to the clinic?

Who gets them?

What do they do with them?

When are they matched with the chart?

Who matches them?

Are results prioritized by type of test, or for abnormal results?

Do all results go to the doctor?

How?

What does the doctor do with them?

How does the MD notify MA what needs to be done about the results and how does the MA get the information?

How long does it take?

Do results get to the patient?

How?

Letter

Phone call

What happens if patient can't be reached?

Who?

When?

All results or only abnormal?

What is documented?

How do you know that labs were ordered, done, results returned, seen by MD, and given to patient?

[How is the loop closed?](#)

|  |  |
|--|--|
|  |  |
|--|--|

**Lab – cont.**

Is there anything else?

|                                |  |
|--------------------------------|--|
| Add additional questions here: |  |
|--------------------------------|--|

|                  |  |
|------------------|--|
| <b>Referrals</b> |  |
|------------------|--|

|   |  |
|---|--|
| What are your most common referral types?<br>Outside your practice<br>Internally within your practice |  |
|---|--|

|   |  |
|---|--|
| What are the ways the patients gets the referral? |  |
|---|--|

|  |  |
|--|--|
| How do you know the patient actually completes the referral? |  |
|--|--|

|   |  |
|---|--|
| How do you receive results of the referral, and what do you do with them? |  |
|---|--|

|                              |  |
|------------------------------|--|
| How is the patient notified? |  |
|------------------------------|--|

|                                    |  |
|------------------------------------|--|
| How do results get into the chart? |  |
|------------------------------------|--|

|                         |  |
|-------------------------|--|
| Is there anything else? |  |
|-------------------------|--|

|                                |  |
|--------------------------------|--|
| Add additional questions here: |  |
|--------------------------------|--|

## Check out process

|   |  |
|---|--|
| How does the patient check out?   |  |
| Who checks out the patient?   |  |
| Are follow up appointments made?  |  |
| How is payment handled?<br>Co-pay<br>Billing  |  |
| Who completes the super bill/encounter form?<br><br>Where does it go after the visit? |  |
| Is there anything else?   |  |
| <a href="#">Add additional questions here:</a>  |  |