



# Clinical Practice and Workflows

Foundational Curriculum:  
Cluster 2: Clinical Process

Module 2: Clinical Practice and Documentation

Unit 1: Clinical Practice and Workflows

FC-C2M2U1

Curriculum Developers: Angelique Blake, Rachelle Blake, Pauliina Hulkkonen, Sonja Huotari, Milla Jauhiainen, Johanna Tolonen, and Alpo Värri

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# Unit Objectives



- Describe clinical practice
- Describe the workflows related to various roles, and understand how electronic health records affect these workflows
- Identify common outpatient workflows, including the processes of scheduling, registering, visit management including SOAP, and following up of patients
- Identify common inpatient workflows, including the processes of admission, acuity determination, transfer, treatment and discharge of patients
- Describe the workflows related to physically tracking, triaging, and managing acuity of patients throughout the continuum of care
- Describe the role of patient and data management systems in processes and workflow
- Describe how electronic health records facilitate structured workflows and how this benefits patients, care providers in their clinical practice, the allied health team, and healthcare facilities



# What is Clinical Practice?

- As you have learned, a clinician is a skilled staff member of the allied health team, usually professionally educated, trained, licensed and/or credentialed, who provides direct patient care
  - Clinicians include doctors, nurses, pharmacists, patient care assistants, therapists and others who provide care to patients
- **Clinical practice** is the combined activities undertaken by medical staff at the different areas of expertise and specialization (such as surgery, podiatry, pediatrics, etc.) within all of the settings and domains of health-related organizations





# What is Clinical Practice? (cont'd)

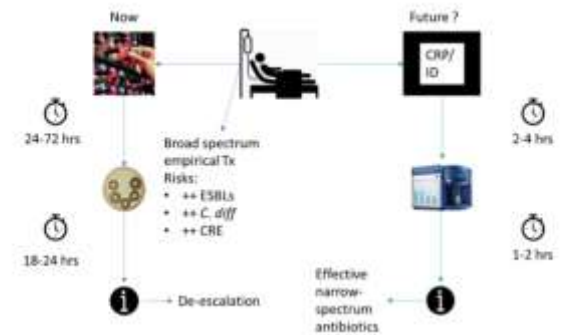


- The practice of medicine by health practitioners involves the assessment/diagnosis, treatment, and management of patients' health status and conditions
  - It also includes determining the patient's **acuity** (the level of severity of an illness - one of the parameters in patient classification systems that serve as a guideline for allocation of nursing staff)



# What are Provider Workflows?

- **Workflow** is the process of formulation and execution of an automatic system of rules and procedures. Tasks, information and/or documents are passed from one worker to another for a standardized set of action.
- Some workflows in healthcare settings are administrative or business related. These are called **business processes** or workflows.
- When the processes in healthcare involve clinical practice or direct patient care components, they are called **clinical workflows**. When these clinical workflows include providers of care, the workflows are sometimes called **provider workflows**.





# What are Provider Workflows? (cont'd)



- Provider workflows include physician and nursing workflows, as well as those of other providers
  - There are other workflows involved in other healthcare settings that may not be clinical in nature, including administrative, business and financial workflows
  - These business workflows will be covered in later units
- Workflows of providers and other staff as well as **patient workflows** (workflows that patients follow, such as scheduling visits or completing forms) are very important to integrating, implementing, deploying and optimizing information systems and technology in healthcare organizations



# What are Provider Workflows? (cont'd)



- Electronic health records can both simplify and intensify complex manual workflows; therefore, it is essential that workflows must be carefully engineered to maximize ease of clinical practice and patient care with systems and technology being employed as tools



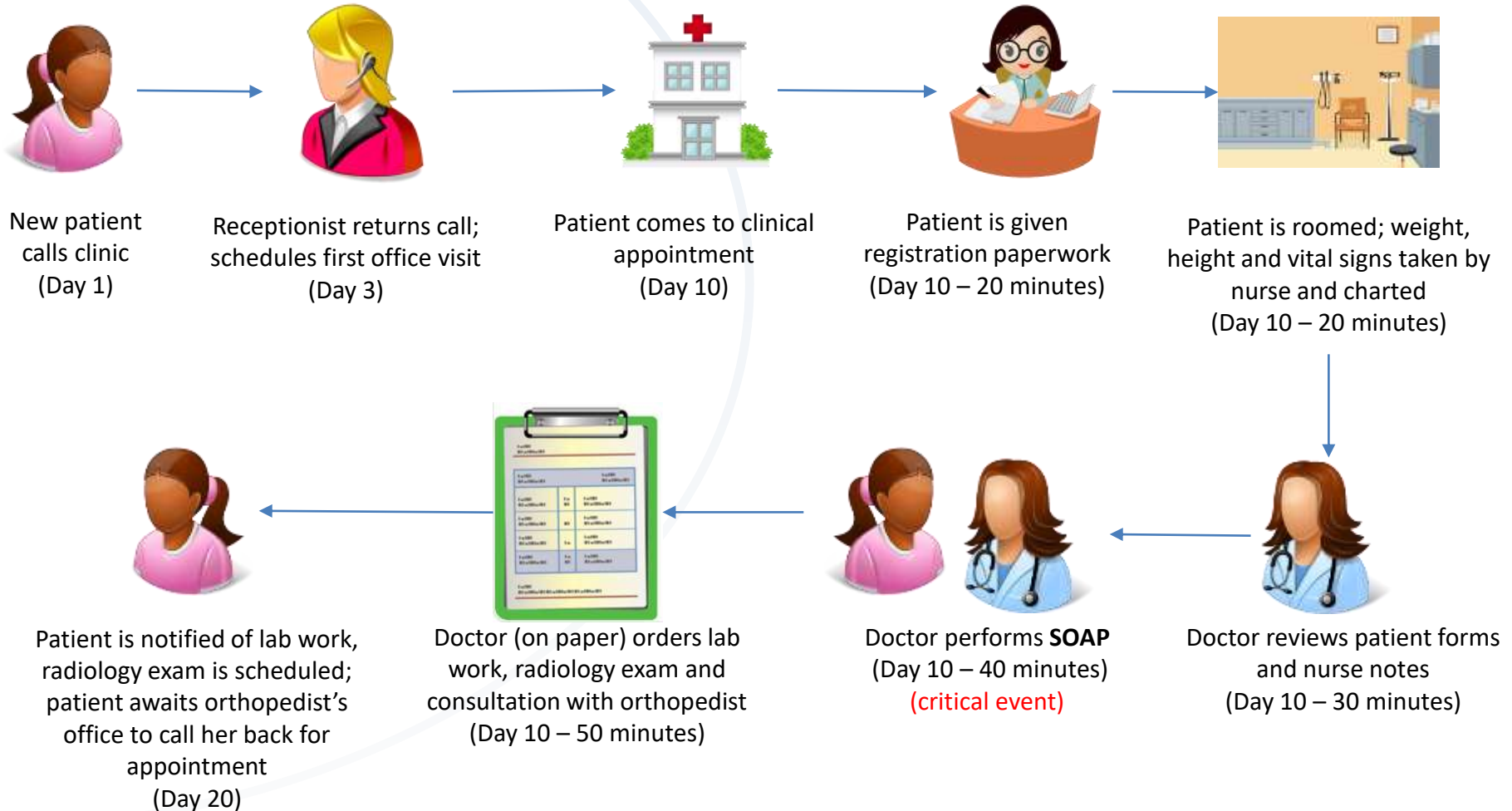
# What Questions Are Needed to Determine a Workflow?

- When mapping a work flow, you should ask the following questions about a work process or procedure. These questions refer to activities such as registering a patient, drawing blood, administering a medication or performing a surgery:
  - *Who is involved? Who is performing the task, and who is the recipient, if anyone? Are others involved?*
  - *What happens from the perspective of the patient?*
  - *What happens from the perspective of the care provider?*
  - *When do the events occur, in which sequence or order?*
  - *Where is the location of the task?*
  - *Which equipment or devices are used in the task?*
  - *What are the safety, security or quality requirements?*
  - *What is the expected outcome?*
  - *Is anything dependent upon the workflow? Does it trigger another event, such as a worklist, order or referral?*
  - *What are the critical components of the task? Can specific components be prioritized in order of importance?*



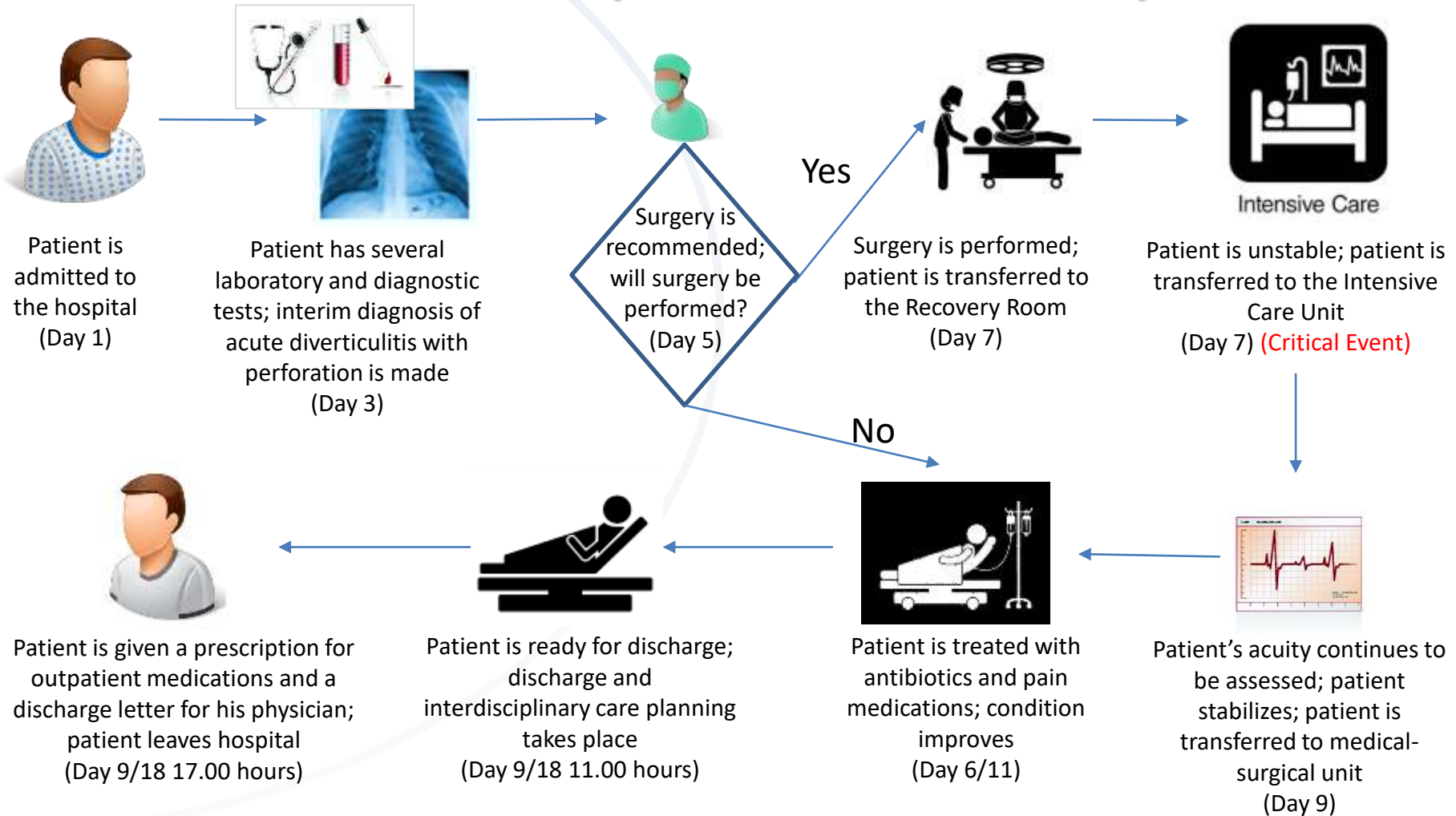


# Example of Basic Outpatient Clinical Workflow (Manual Processes)



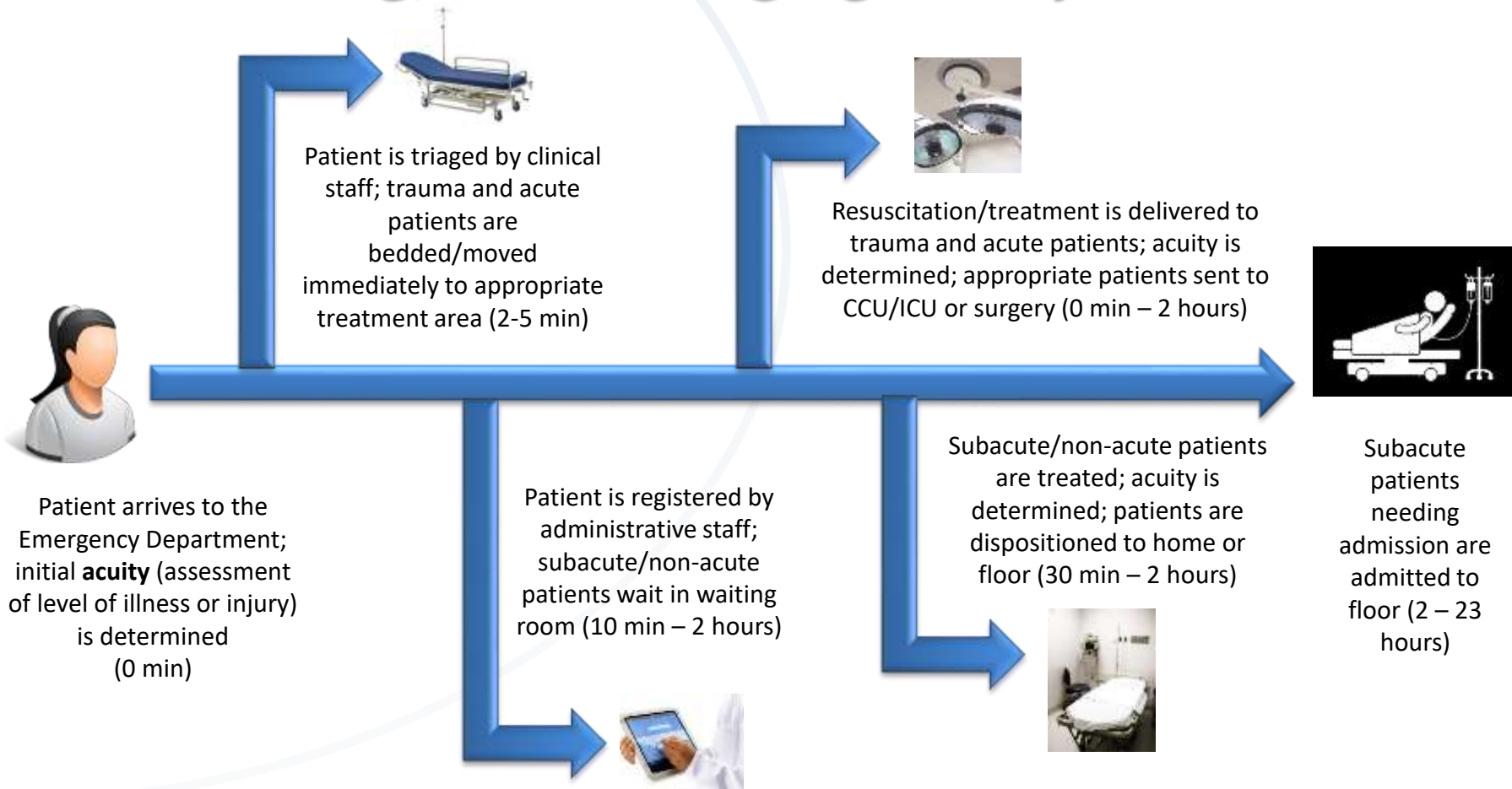


# Example of Basic Inpatient Clinical Workflow (Manual Processes)





# The Emergency Room: An Example of Triage, Tracking, and Managing Acuity of Patients





# Important Components of Clinical Workflow



- Process begins (there is a beginning and an end to every process)
  - Process events: Who -> does -> what? (each process has a subject, the “who”, an action, the “does”, and an object, the “what”)
  - Decision points: “Yes / No” (are there any key points in the process where something must happen in order for the process to continue?) (these are indicated by a diamond shape on workflow maps)
  - Key processes: (are there any priority events that take place in the process?)
- Process ends



# The Role of Patient and Data Management Systems in Processes and Workflow



- We have seen several examples of manual clinical workflows
- The role of patient and data management systems are to make these processes and systems more safe, efficient, and effective
- For example, when a paper registration process is made electronic, it saves time, human and physical resources, and infuses quality into the process (such as avoiding handwriting and increasing accuracy and validation of information)
- We will see examples of “clinical transformation”, or changing manual processes to electronic processes, in a future unit



# How Electronic Health Records Facilitate Structured Workflows and Benefit Staff and Patients



- Electronic health records use structured data elements such as problem lists, medications, and allergies, instead of narrative text
- This facilitates structured, organized and efficient workflows, which saves time and energy, and minimizes or avoids errors
- Patient and staff satisfaction can increase when patient and data management systems are carefully integrated into clinical workflows



# Unit Review Checklist



- Described clinical practice (EN05)
- Described the workflows related to various roles, and understand how electronic health records affect these workflows (DB03)
- Identified common outpatient workflows, including the processes of scheduling, registering, visit management including SOAP, and following up of patients
- Identified common inpatient workflows, including the processes of admission, acuity determination, transfer, treatment and discharge of patients
- Described the workflows related to physically tracking, triaging, and managing acuity of patients throughout the continuum of care
- Described the role of patient and data management systems in processes and workflow (DB02)
- Described how electronic health records facilitate structured workflows and how this benefits patients, care providers in their clinical practice, the allied health team, and healthcare facilities (DL01)



# Unit Review Exercise

1. Produce a short workflow mapping of the following process (use pages 8-10 of this unit as an example):
  1. The process begins
  2. The patient arrives to the medical-surgical unit
  3. Physician orders medication for patient
  4. Nurse gets a worklist notifying him that patient needs medication
  5. Nurse asks patient's name and birthdate to validate the patient is correct
  6. Nurse asks patient if she has allergies
  7. Important: If yes, he does not administer medication
    - a. The allergy is noted in the chart
    - b. A new medication is requested
  8. If no, he administers the medication
    - a. The process is complete
2. Is there a critical step in the above mapping exercise?





# Unit Exam



1. Which of the following statements defines “clinical process”?
  - a. Deploying and optimizing information systems and technology
  - b. Magnifying complex manual workflows
  - c. Mapping nursing and physician work flows
  - d. The combined activities undertaken by medical staff at the different areas of expertise and specialization
  
2. Which of the following statements about provider workflows is false?
  - a. EHRs always make complex workflows easier
  - b. Clinical practice involves many specific ways in which work flows
  - c. Patient workflows are very important to integrating EHRs
  - d. Electronic health records can both simplify and intensify complex manual workflows



# Unit Exam (cont'd)



3. Which of the following questions would help determine a workflow for medication administration?
  - a. In which city is the organization located?
  - b. Who is the patient's next of kin?
  - c. When will the patient's barcode armband be scanned for medication cross-checking?
  - d. What mode of payment did the patient select at registration?
4. Which of the following activities are not part of an ambulatory workflow?
  - a. Registering a patient
  - b. Admitting a patient
  - c. Scheduling a patient
  - d. Rooming a patient (putting the patient in a room)



# Unit Exam (cont'd)



5. Which of the following activities are usually part of an emergency department workflow?
- a. Performing surgery
  - b. Interdisciplinary care planning and discharge summary
  - c. Transfer from the ICU to the medicine-surgical unit
  - d. Determining acuity and triaging the patient