

Effective Electronic Patient Record Implementations

Workflow Design and Content

March 2021



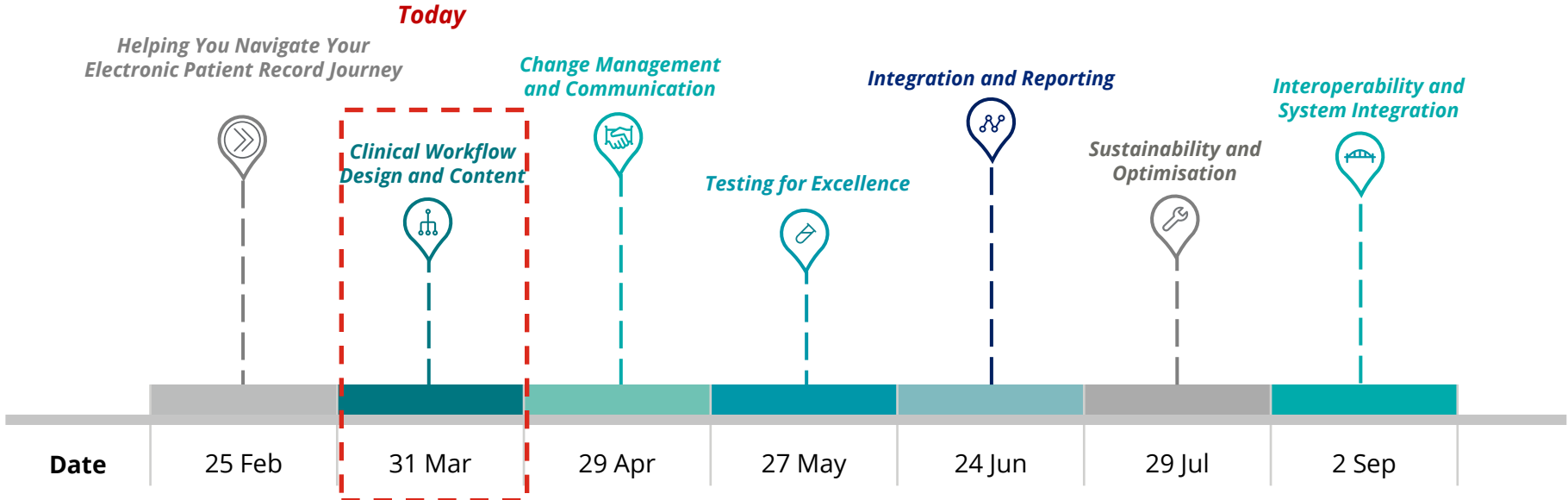
Effective EPR Implementations: Overview of the Series, Purpose, and Schedule

The Effective EPR Implementations webinar series is a set of seven one-hour virtual sessions with Healthcare providers. This series is focused on EPR implementations and driving your success through a holistic implementation approach

Purpose

- ✓ Focus on effective partnerships necessary to succeed in EPR implementations
- ✓ Highlight common pitfalls faced by clients and areas needing support
- ✓ Share key strategies necessary for healthcare practice transformation through EPR implementations

Schedule



Speaking With You Today



Fran Cousins
Partner, UK



Marc Perlman
*Global Digital CARE
Leader, US*



Denise Mancuso, RN
Specialist Leader, US



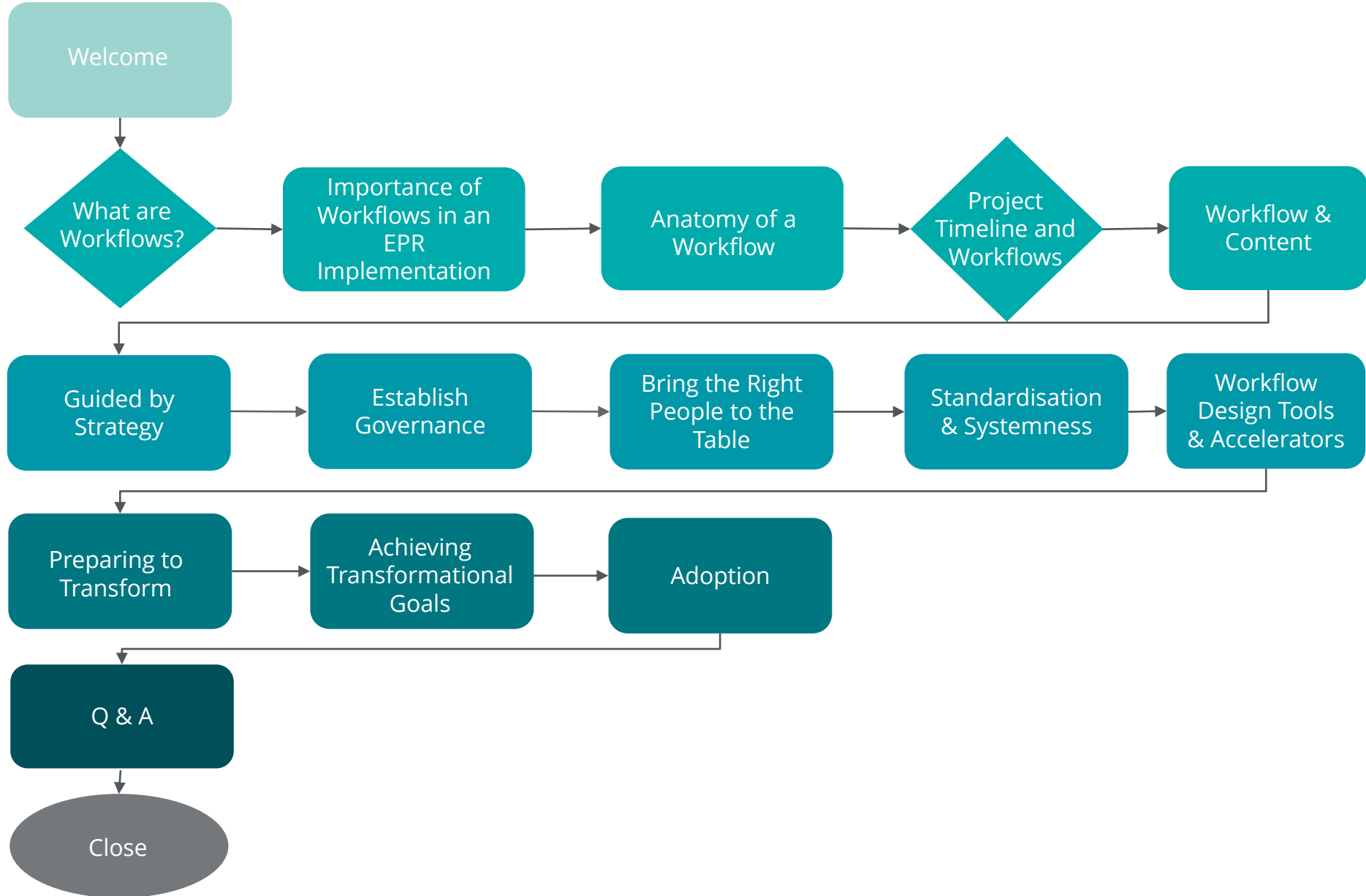
Mark Snyder, MD
Specialist Executive, US



**Cindy Stuhmeier,
RN**
Specialist Master, US

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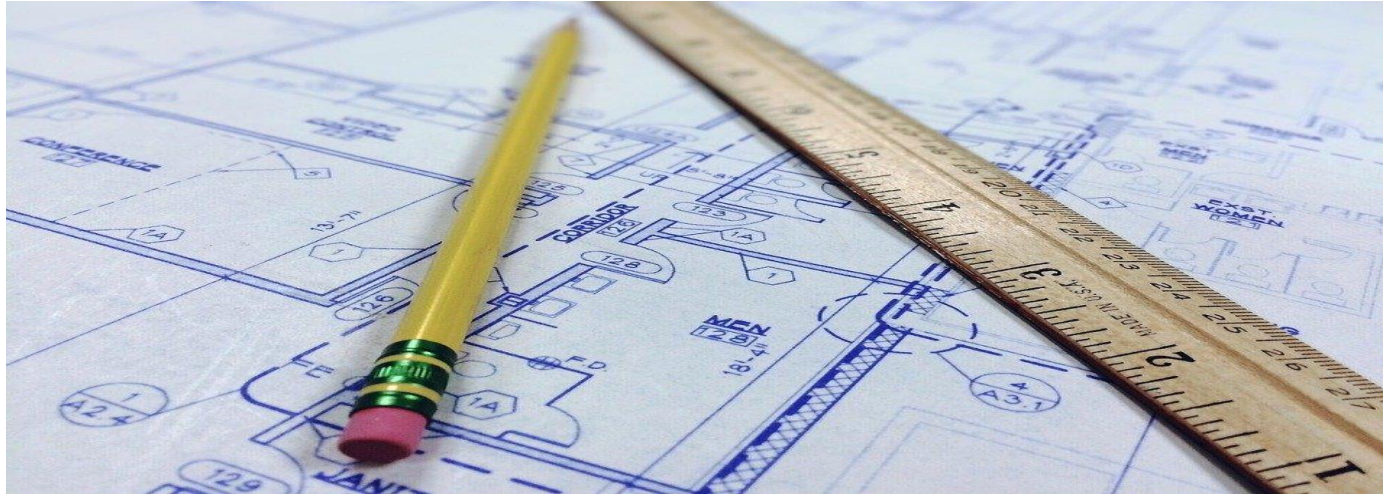
- 1. Welcome**
Frances Cousins & Marc Perlman
- 2. Workflows**
Denise Mancuso, RN
- 3. Workflow Design**
Cindy Stuhmeier, RN
- 4. Lessons Learned**
Mark Snyder, MD
- 5. Q & A**
All
- 6. Close**
Frances Cousins & Marc Perlman



Workflows - Overview

Workflow Definition

Workflows are the foundation of an EPR implementation. They provide the “Blueprint” or “Recipe” for the overall design



Workflow ['wɜrkflō]

NOUN

- A Workflow is **the repeatable pattern of the activities sequence or steps that take place to complete a specific task on a regular basis.** The flow being described includes tasks, documents or information that are passed to a proper workflow participant for action in a sequence determined by actions or pre-defined business rules, frequently called workflow rules.

Banana Nut Bread Recipe

- One half cup of butter
- One and one half cup of sugar
- 1 teaspoon vanilla
- 3 eggs
- 3 big bananas
- One fourth cup milk
- 2 cups flour
- 1 half teaspoon salt
- 1 half teaspoon baking soda
- 1 1/2 cup of walnuts.

350°

60 min

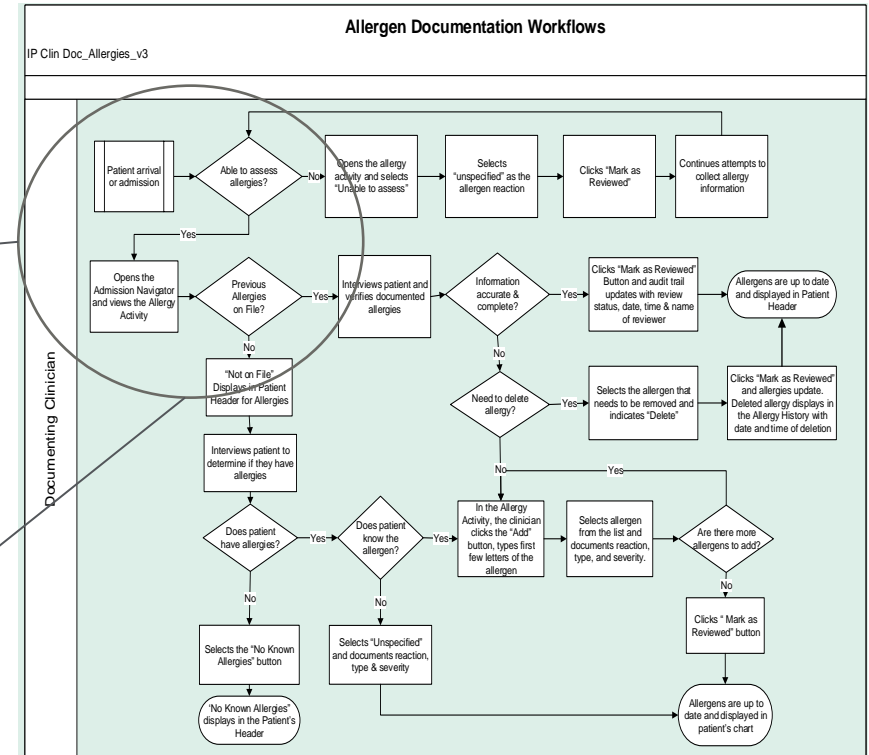
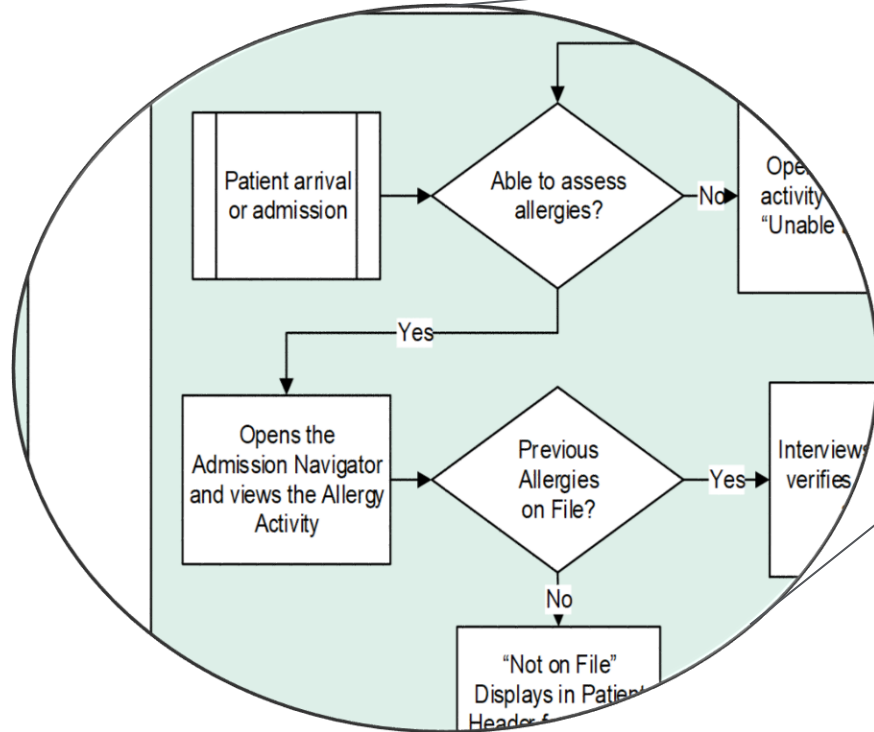


HOWMANY.PEDIA

What Are Workflows?

Workflows are a set of interrelated or interacting steps that are taken by caregivers to carry out tasks applicable to their role

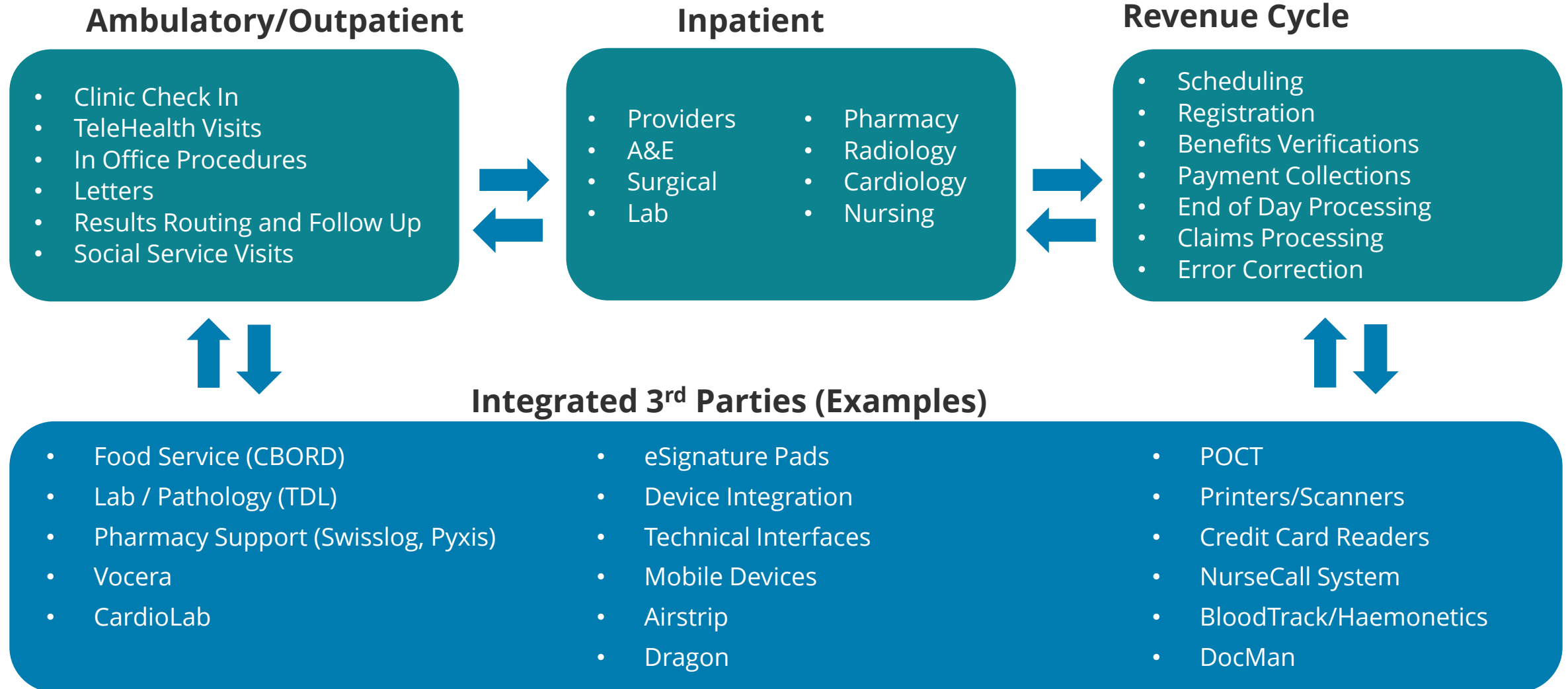
- Workflows need to be **ROLE-BASED** and include **OPERATIONAL, TECHNICAL AND** relevant **THIRD PARTIES**
- Workflows need to be designed for all areas of the care delivery cycle – Access/Registration, Clinic Visit, Inpatient/OR/Ancillary Care Areas, Billing



Software vendors will come with workflows for their systems. This discussion is about designing workflows to support your organisation in delivering care using an EPR.

Workflows Impact All Areas (Examples)

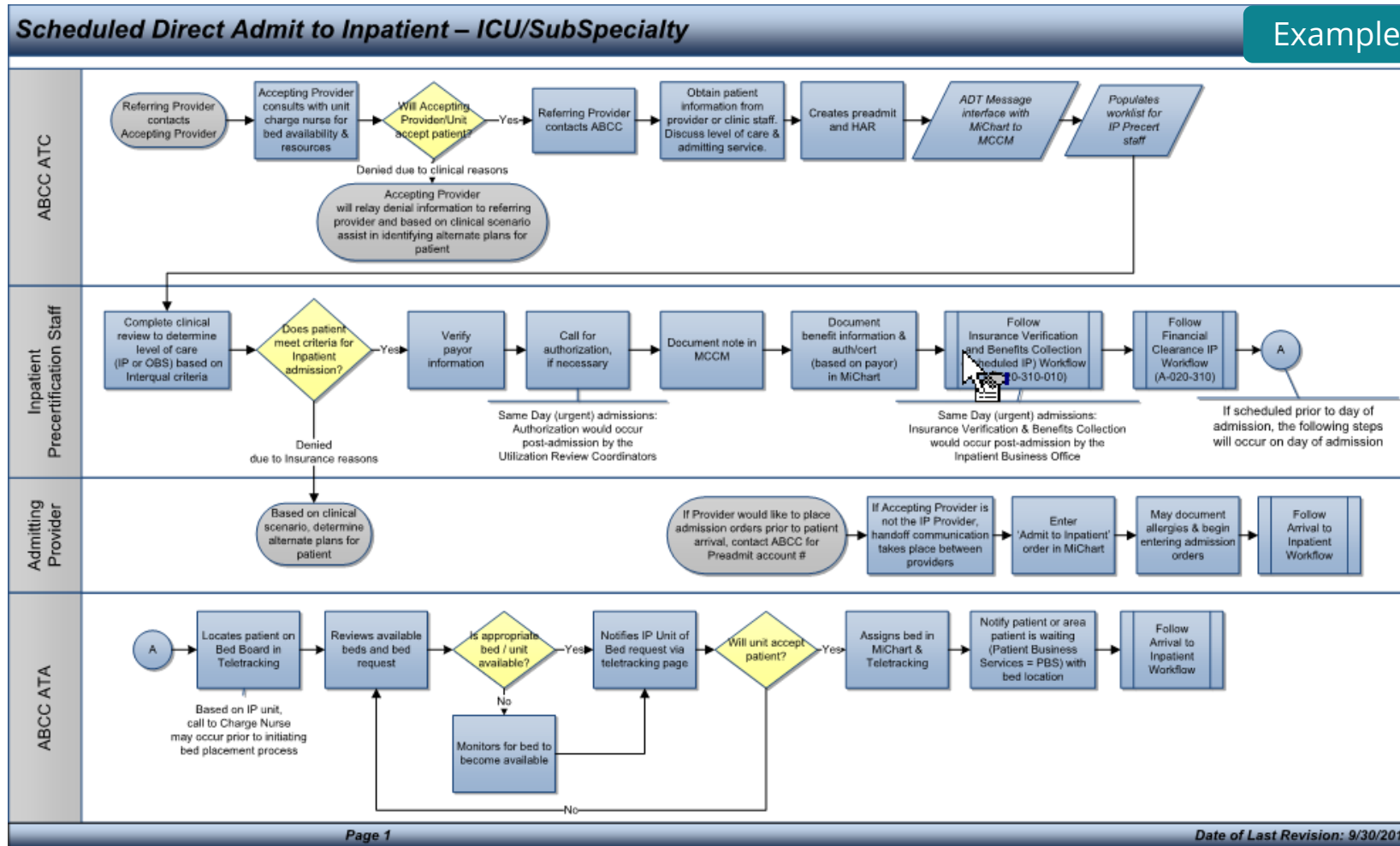
Workflows are not just important to Clinical Care Areas – they are for all areas. Workflows are not just for the EPR – they also touch all integrated 3rd parties. A standalone workflow is also part of a larger ecosystem.



Anatomy of a Workflow

The Visio Workflow Design serves as the Foundation for creating the overall experience and end to end design

- Standardised Template with a standard layout, standard naming, and standardised roles
- Utilise a tool such as Microsoft Visio to document
- Role Based Swim lanes
- Standardised icons to identify actions, decision points



- Highlight connection points to other workflows and hand-offs between caregivers
- Highlight key organisational decisions
- Highlight points of change or training points
- Define and understand all key hand offs (system hand offs and non-system hand offs)

Project Timeline & Workflows

18 – 24 month timeline

Phase 0: Readiness/Visioning:

- Finalising project scope, vision, TCO and hiring and onboarding of the implementation team to support the programme.

Phase 1: Scope of Design:

- Solution scoping and workflow review sessions to provide input into how new processes should be developed to optimise care, maximise efficiency, and minimise waste. Start organisational development work and workforce planning.

Phase 2: System & Content Build:

- Validating the technical design, operational workflows and content in the EPR. Aligning 3rd Parties.

Phase 3: Testing:

- Completion of the configuration and testing of the whole EPR service and the new clinical and operational processes.

Phase 4: Training & Go-Live:

- Training end users and supporting the go-live with at-the-elbow support 24/7 to help the transition to new working practices and IT systems.

Phase 5: Post-live and Optimisation:

- Stabilisation of the new clinical and operational processes, the EPR system workflows and optimisation of their ongoing use within the acute setting. Benefits realisation tracking will begin against baseline data measured prior to the implementation.

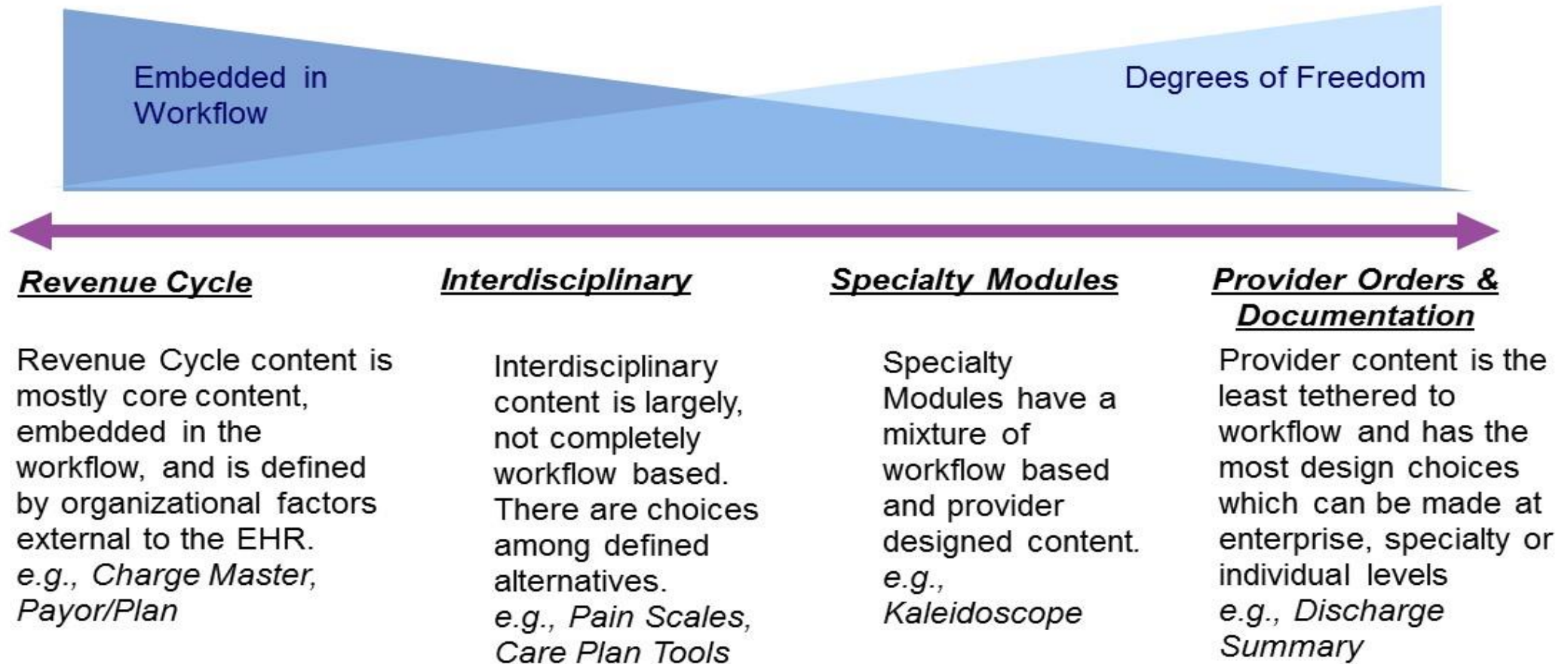


Workflow Design is an iterative process that starts the kickoff of your Design & Build Phase. Ideally, your workflows should be in a “complete” form prior to Testing – but you will continue to update/revise as issues are identified during testing.

Workflow & Content

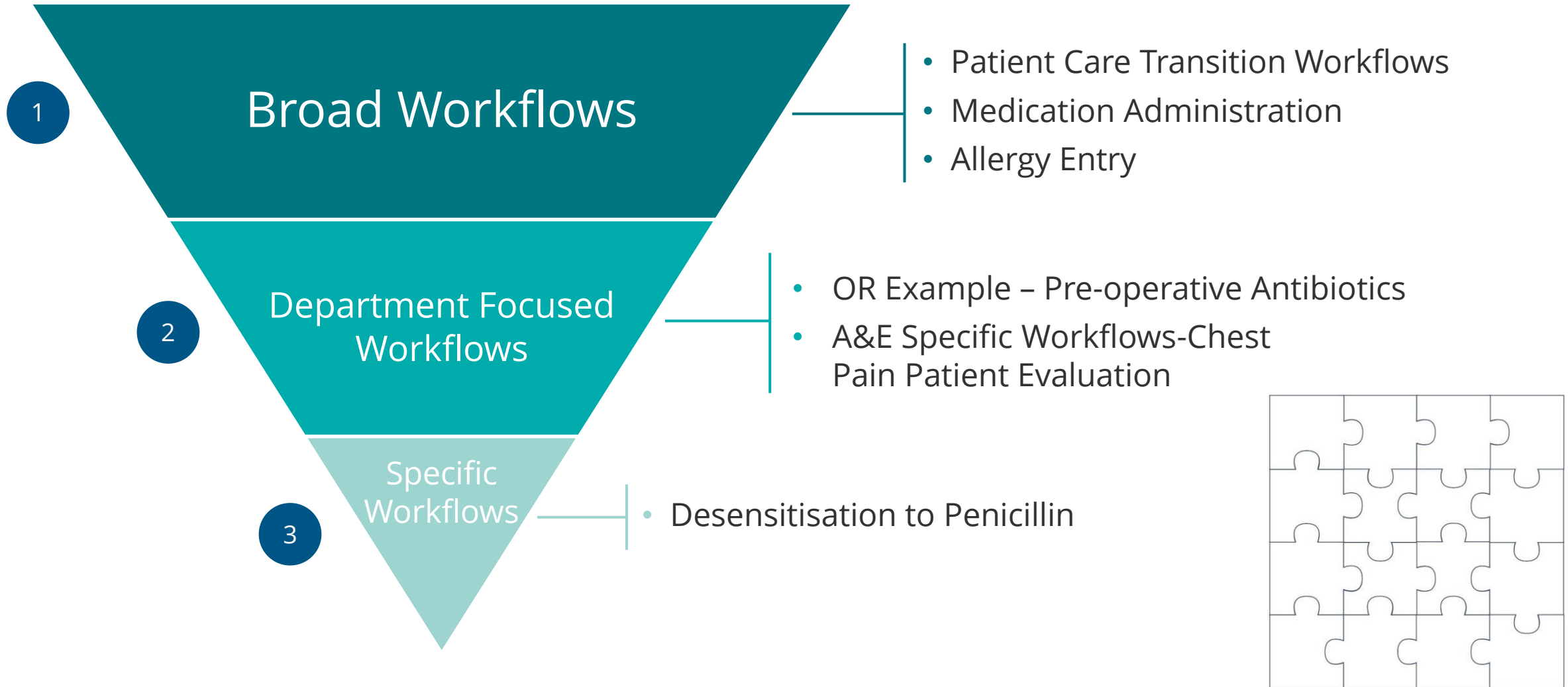
Workflow supports content development. Focus is on “convergence” of system build, workflow and practice

The Degree to Which Content Is Embedded in Workflow Varies by Content Type and there Is a Reciprocal Variation in Design Choices



Types of Workflows

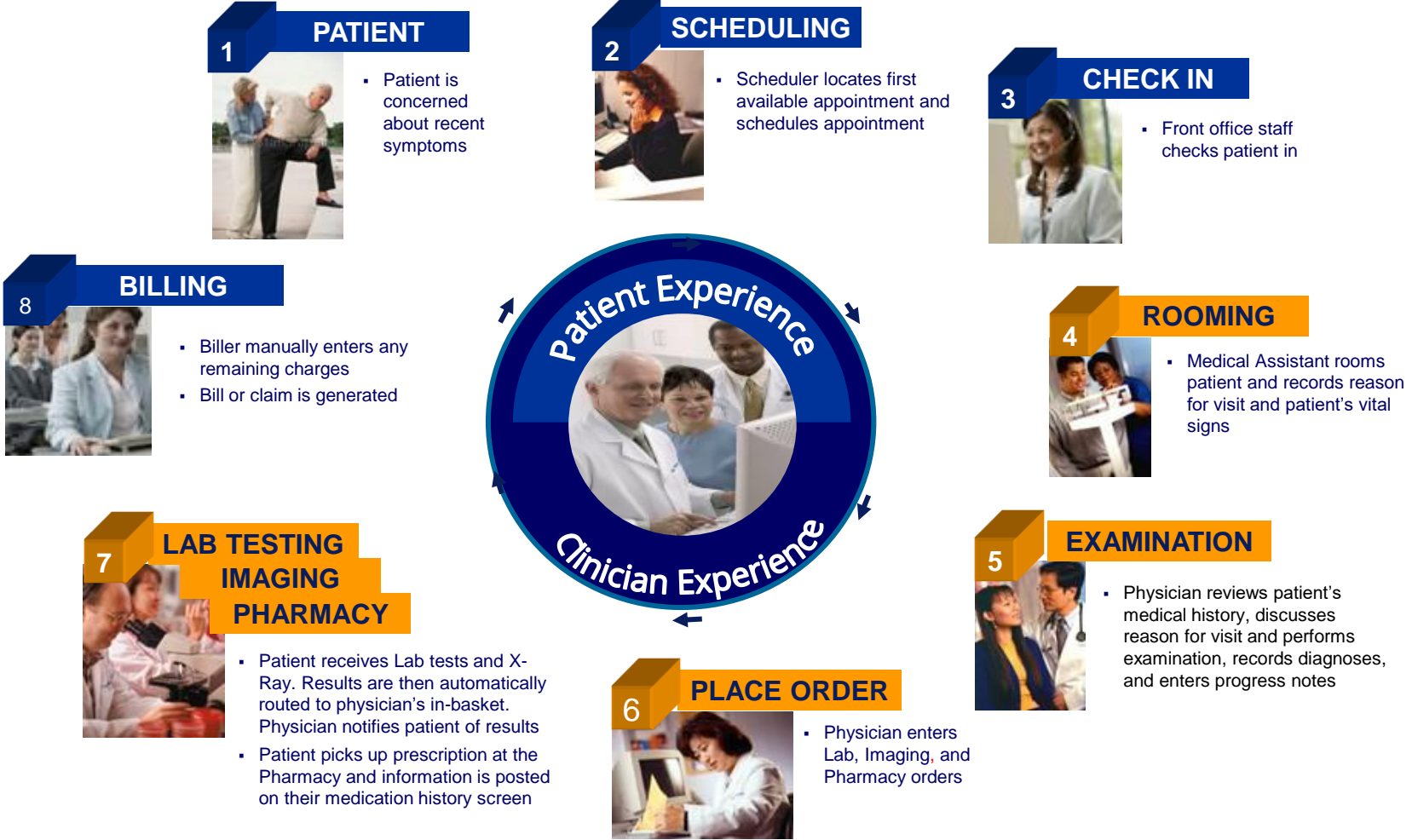
All workflows are not created equal, but each is important, and they need to “link” together like pieces of a puzzle



Ambulatory Patient Visit Workflow Narrative - Example

Individual workflows come together to create the overall experience for Clinicians and Patients

Ambulatory Patient Visit is comprised of numerous workflows in multiple locations



The Ripple Effect – Workflows Impact Every Area of Your Project



- System Build
- Testing
- Operational Readiness
- Policy and Procedure development
- Change Management
- Training Curriculum

Comprehensive Workflow design is essential to the success of your project - not optional

Workflow Design

Design with Intent

The design of workflows is one of the key vehicles that organisations can use to transform how they deliver care and help to ensure a standardised care experience across the organisation

Guided by strategy



- Transformation, not just implementation
- Targeted metrics and benefits

Establish Governance



- Framing key questions and considerations
- Design Guidelines
- Engagement of physicians, SMEs, and patients

Bring the right people to the table



- Healthcare is a team sport
- Clinician-driven

Standardisation and Systemness

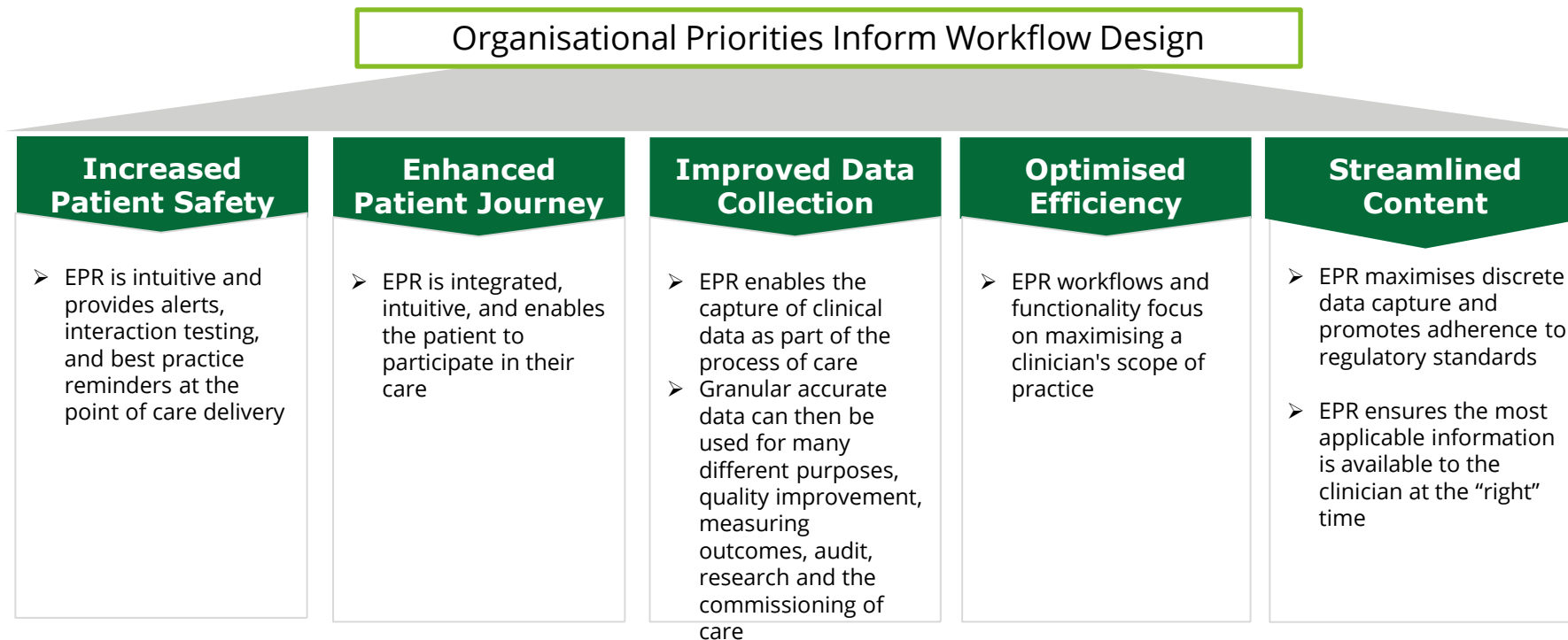


- Standardised workflows and processes focused on patient and caregiver experience
- Change management emphasis throughout
- Role standardisation
- Workflow sources and tools

Guided by Strategy- Organisational Priorities

Implementing an EPR is one of the largest projects you will take on as an organisation

- As an organisation, you need to decide what you want to achieve – metrics/benefits, how you deliver care, the Clinician experience, and the Patient/Family Experience
- In designing and articulating your strategy, there will be decisions to made on what can and cannot be done. As an organisation you will need to define your budget, timeline, and prioritise what you want to achieve in the short term and long term



Guided by Strategy- Establishing Design Parameters

Ensuring your workflow design programme has parameters will help your teams keep a holistic bigger picture in mind regardless of what the design principles your organisation ultimately adopts



Grow Your Digital Vision

Design for today, but keep in mind the bigger picture. What are the clinical and technology initiatives you hope to implement in 3, 5, 10 years



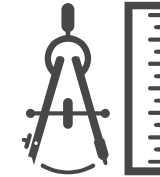
Stay on the Journey

Once a vision is established, guide project teams and subject matter experts to stay within established parameters and adhere to budget and regulatory requirements



Understand the Customer

Spend time learning about the “customer” and identify pain-points in workflows early and design with a solution in mind



Identify Metrics and Benefits

Determine priority safety, quality and financial metrics and design workflows to support these objectives



Consider Leading Practice

Apply a “maturity-model” to understand the gap between where you are today and where you want to be with the new EPR

Effective workflow design parameters promote....

Standardisation

Consistent experience for the clinician and the patient

Cohesiveness

Design supports seamless cross-functional area workflows

Adoption

When workflows address pain points, clinicians (and patients) will use the system’s design as it is intended

Establish Governance

Setting a strong foundation from the beginning enhances overall outcomes and Programme success

Governance

A well-structured governance model helps ensure decisions are made at the right level, by the right stakeholders, at the right time

Guiding Principles

Establishing appropriate Guiding Principles sets the ground rules for system design and implementation, guides decisions, and keeps teams focused on overall goals, objectives, and the desired end state

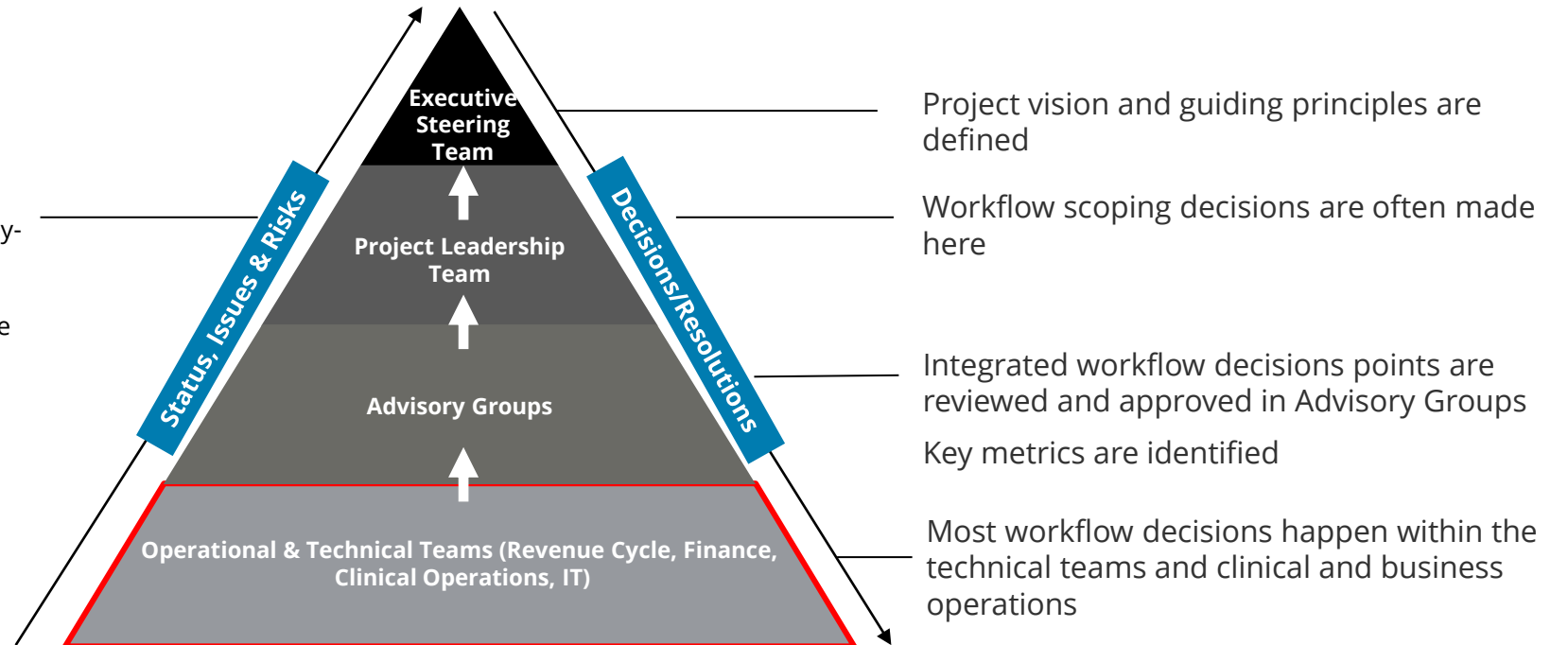
Effective Decision Making

Decisions that could potentially impact the programme timeline, cost, quality, safety and/or future-state operating model should be escalated to programme and clinical governance



Establish Leadership Support

Leadership support and buy-in is cultivated from the very beginning of the Programme



Project vision and guiding principles are defined

Workflow scoping decisions are often made here

Integrated workflow decisions points are reviewed and approved in Advisory Groups

Key metrics are identified

Most workflow decisions happen within the technical teams and clinical and business operations

Importance of Governance, Guiding Principles and Effective Decision Making



1 Commitment from key stakeholders



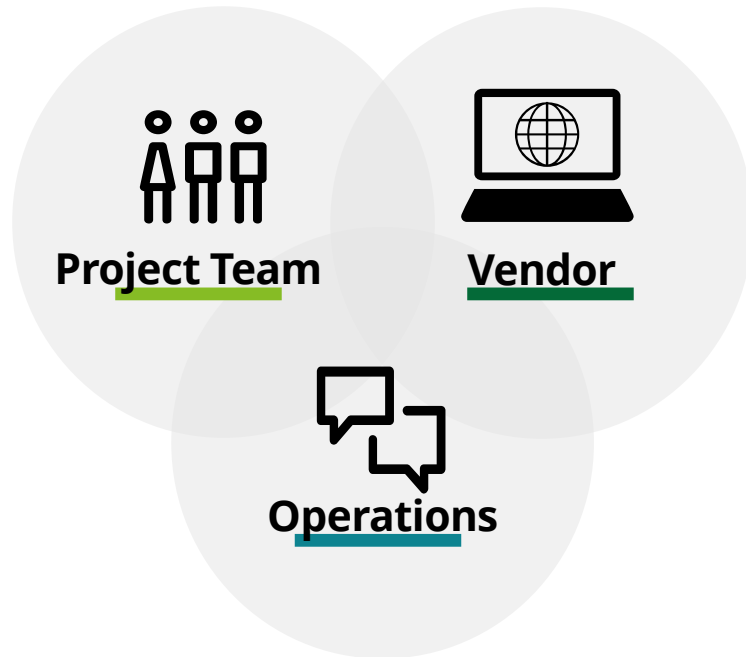
2 Align direction



3 Better decisions

Bring the “Right” People to the Table

Workflow Design is a Team Sport; this is one of the first steps in socialising your vision and getting people engaged in the EPR



Project Team

Analysts, trainers and other project team members bring a wide range of experiences to the table; more importantly, all project teams are dependent on workflow design.

Operations

Clinicians and operations bring the subject matter expertise and understand the unique needs of the organisation.

Vendor

The vendor brings technical expertise and the voice and experience of other similar customers.

When everyone with a “stake in the game” participates in design, workflows support the right clinical and business priorities.

Standardisation and “Systemness”

“Systemness” is about moving the entire organisation to a standard operating model. The EPR is a tool to help you get to a standard system, but your workflow and content design are the key enablers to achieving this goal. The functionality and usefulness of an integrated EPR is centred around **standardisation**

KEY “SYSTEMNESS” DRIVERS

Standardised Roles

Standardised Process

Standardised Content

Standardised Documentation Tools

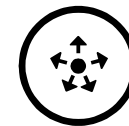
Standardised Measurements



Improved accuracy and consistency in reporting



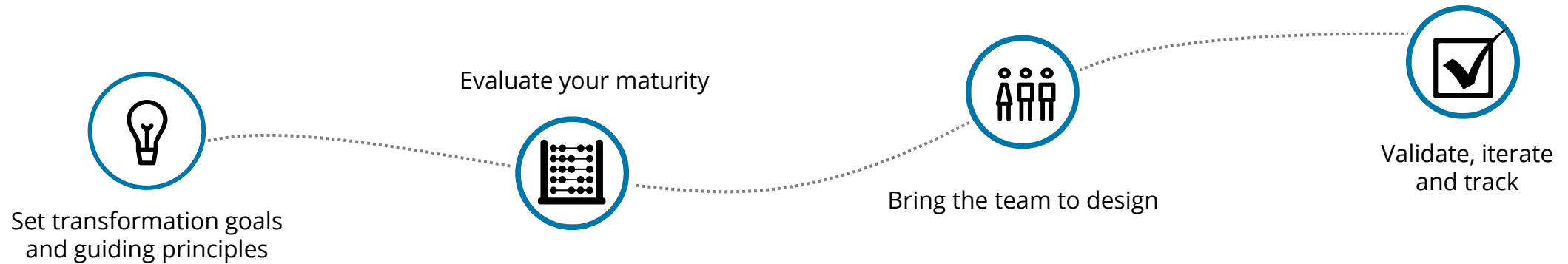
Better clinician and customer experience



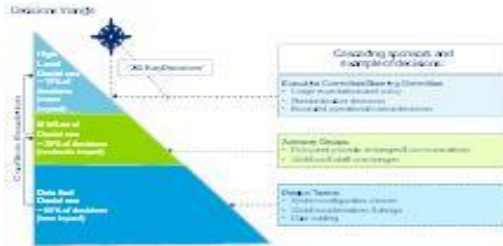
System is built for ongoing upgrades

Workflow Design Tools and Accelerators

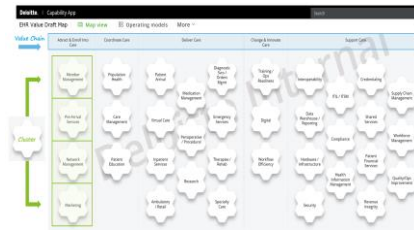
Deloitte has robust tool sets to support each area of workflow design. These tool sets can be utilised to help organisations “jump start” and guide your organisation through establishing budget/scope/timeline, establishing a Governance Process and designing to your strategic vision



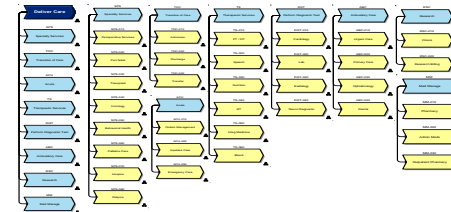
Deloitte Workflow Accelerators (Illustrative)



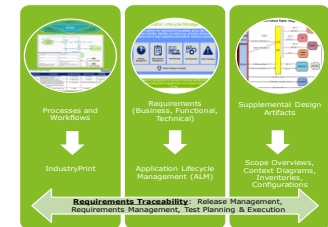
Key Decisions



**CapabilityEdge™
Process Maturity**



**IndustryPrint™
Process Models**



**Workflow Inventory
& Tracker**

Lessons Learned

Preparing to Transform

Define

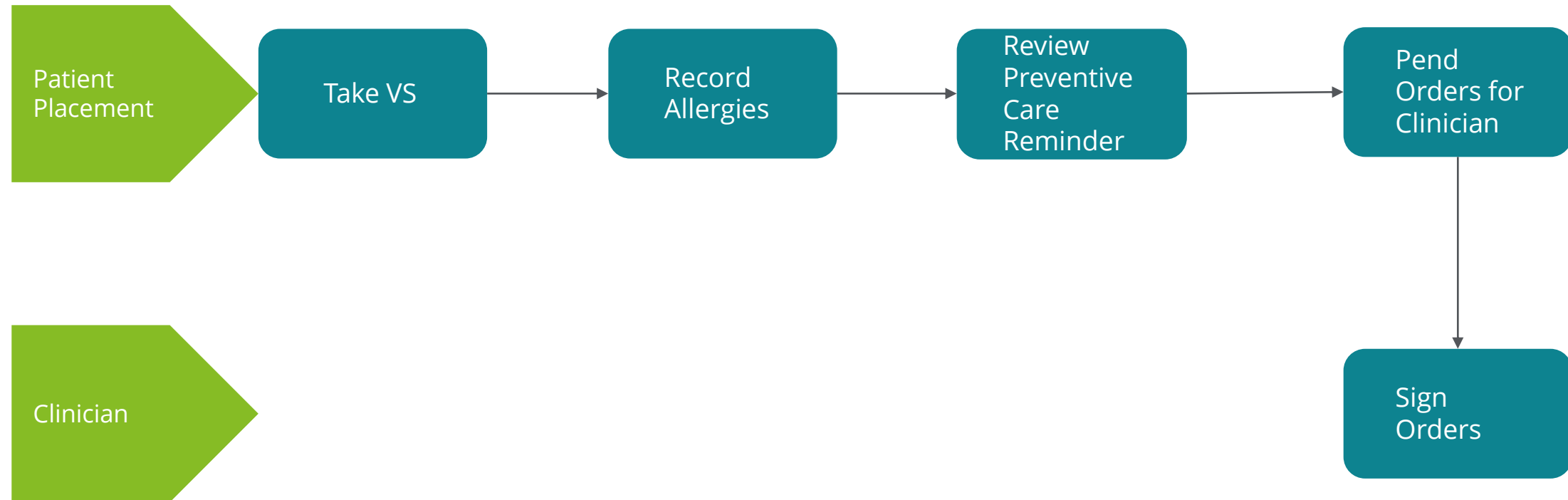
Document

Communicate

- **Governance** – Define the governance bodies, membership, and decision rights
- **Digital Strategy**
 - What do you hope to accomplish?
 - What should care look like?
 - What is the experience for clinicians, staff and patients?
- **Project Guiding Principles**
 - If the integrated EPR you are implementing has the capability, do not bring in a 3rd party
 - Share information with patients
 - Improve preventive care
- **Decisions** – Design and maintain a robust decision tracker

Achieving Transformational Goals

Preventive Care Excellence Patient Placement Workflow

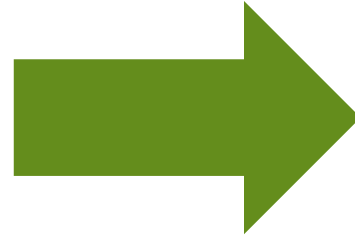


Guiding Principles inform the workgroups of opportunities to modify workflows to achieve organisational goals

Adoption

Challenges

- Bridging from current state to future state
- Defining the degree of variability that will be acceptable
- Ensuring smooth integration of roles



Change Impact Analysis

- Identify changes in roles, policy, etc., needed for successful adoption of new workflows

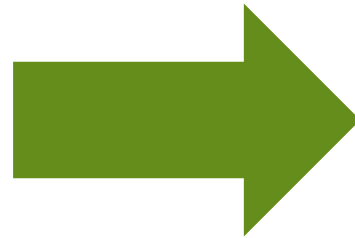
Change Communication:

- Currently we do "X", in the future we will do "Y"
- Demonstrations
- Short videos

Adoption

Challenges

- Bridging from current state to future state
- Defining the degree of variability that will be acceptable
- Ensuring smooth integration of roles



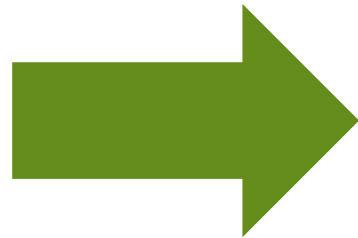
Permissible variation

- End product must be consistent, e.g., Allergies recorded on all patients
- Variation in clinics may drive role variation:
 - Immunology Clinic vs. Surgery Clinic

Adoption

Challenges

- Bridging from current state to future state
- Defining the degree of variability that will be acceptable
- Ensuring smooth integration of roles



Integration of roles

- Practise
- Practise
- Practise

Q&A



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- Fit for Future Estate
- Connected Care
- Modern Well Led Workforce



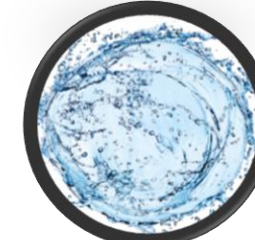
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Join us for our next webinar...

Change Management and Communication

Thursday 29 April 2021

4:00 – 5:00 pm BST