# Effective Electronic Patient Record Implementations

Workflow Design and Content

March 2021

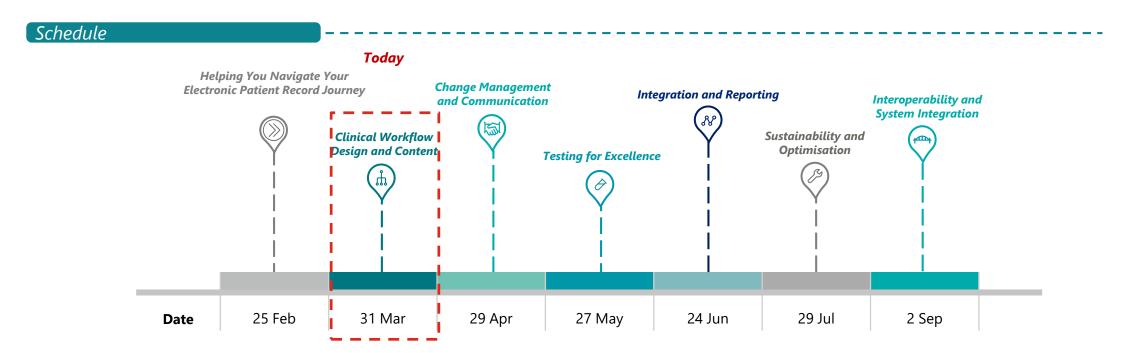


### Effective EPR Implementations: Overview of the Series, Purpose, and Schedule

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



### **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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Frances Cousins & Marc Perlman

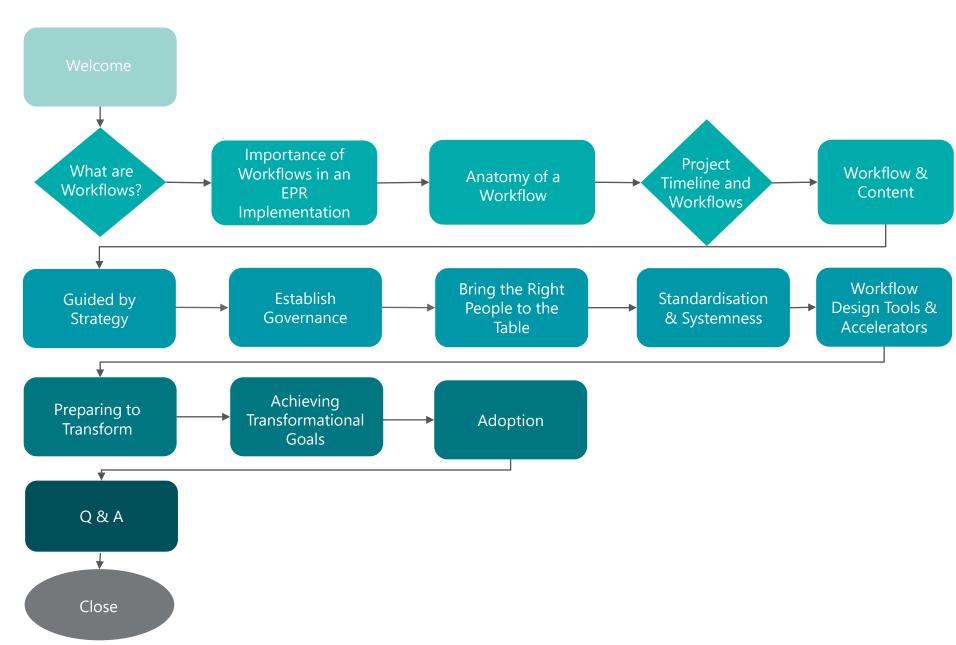
**2. Workflows**Denise Mancuso, RN

**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 ['wərkflo]

 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.

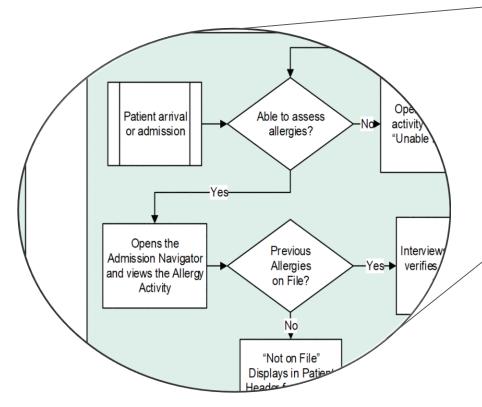


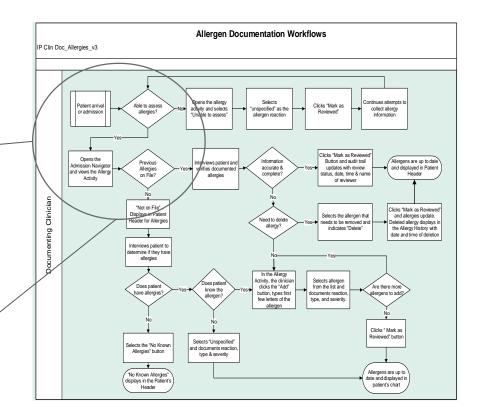
#### What Are Workflows?

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 3<sup>rd</sup> parties. A standalone workflow is also part of a larger ecosystem.

#### **Ambulatory/Outpatient**

- Clinic Check In
- TeleHealth Visits
- In Office Procedures
- Letters
- Results Routing and Follow Up
- **Social Service Visits**



#### Inpatient

- **Providers**
- A&E
- Surgical
- Lab

- Pharmacy
- Radiology
- Cardiology
- Nursing



#### **Revenue Cycle**

- Scheduling
- Registration
- **Benefits Verifications**
- **Payment Collections**
- **End of Day Processing**
- Claims Processing
- Error Correction





- Food Service (CBORD)
- Lab / Pathology (TDL)
- Pharmacy Support (Swisslog, Pyxis)
- Vocera
- CardioLab

- eSignature Pads
  - **Device Integration**
  - **Technical Interfaces**
  - **Mobile Devices**
  - Airstrip
  - Dragon

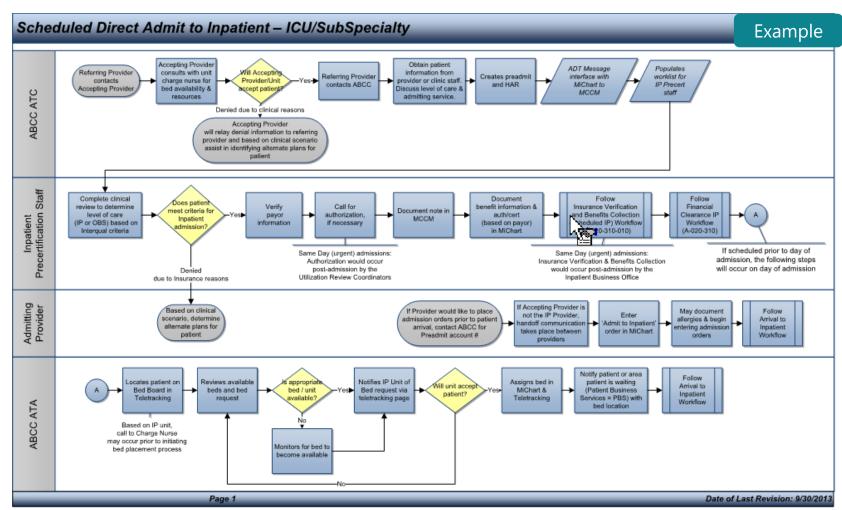


- **POCT**
- **Printers/Scanners**
- **Credit Card Readers**
- NurseCall System
- BloodTrack/Haemonetics
- DocMan

### **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 nonsystem hand offs)

### **Project Timeline & Workflows**

#### 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 3<sup>rd</sup> Parties.

#### Phase 3: Testing:

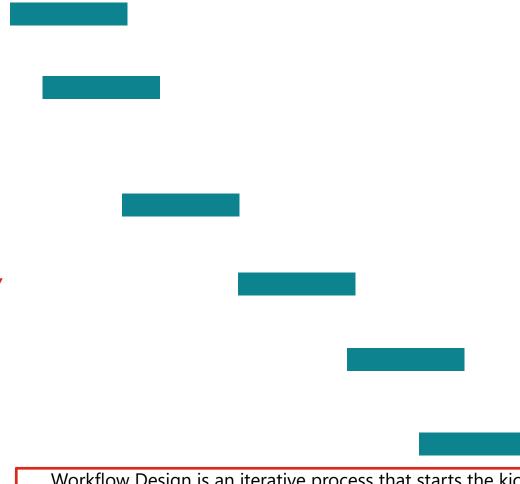
• Completion of the configuration and testing of the whole EPR service and the new clinical and operational processes.

#### 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

Embedded in Workflow

Degrees of Freedom

#### Revenue Cycle

Revenue Cycle content is mostly core content, embedded in the workflow, and is defined by organizational factors external to the EHR. e.g., Charge Master, Payor/Plan

#### **Interdisciplinary**

Interdisciplinary content is largely, not completely workflow based. There are choices among defined alternatives. e.g., Pain Scales, Care Plan Tools

#### Specialty Modules

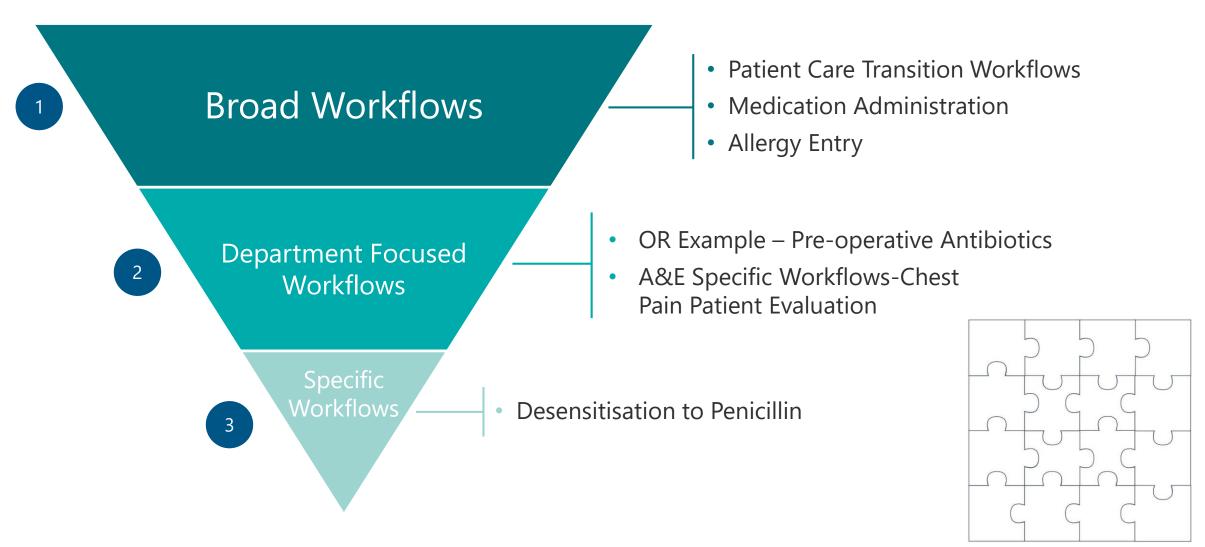
Specialty
Modules have a
mixture of
workflow based
and provider
designed content.
e.g.,
Kaleidoscope

#### Provider Orders & Documentation

Provider content is the least tethered to workflow and has the most design choices which can be made at enterprise, specialty or individual levels e.g., Discharge Summary

### **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**





 Patient is concerned about recent symptoms

### SCHEDULING

 Scheduler locates first available appointment and schedules appointment



 Front office staff checks patient in

BILLING



- Biller manually enters any remaining charges
- Bill or claim is generated



LAB TESTING
IMAGING
PHARMACY

- Patient receives Lab tests and X-Ray. Results are then automatically routed to physician's in-basket.
   Physician notifies patient of results
- Patient picks up prescription at the Pharmacy and information is posted on their medication history screen





 Physician enters Lab, Imaging, and Pharmacy orders ROOMING

 Medical Assistant rooms patient and records reason for visit and patient's vital signs

**EXAMINATION** 

Physician reviews patient's medical history, discusses reason for visit and performs examination, records diagnoses, and enters progress notes

### 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

Organisational Priorities Inform Workflow Design

### Increased Patient Safety

EPR is intuitive and provides alerts, interaction testing, and best practice reminders at the point of care delivery

### Enhanced Patient Journey

➤ EPR is integrated, intuitive, and enables the patient to participate in their care

### Improved Data Collection

- ➤ EPR enables the capture of clinical data as part of the process of care
- Granular accurate data can then be used for many different purposes, quality improvement, measuring outcomes, audit, research and the commissioning of care

#### Optimised Efficiency

➤ EPR workflows and functionality focus on maximising a clinician's scope of practice

### Streamlined Content

- EPR maximises discrete data capture and promotes adherence to regulatory standards
- EPR ensures the most applicable information is available to the clinician at the "right" time

### **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 painpoints 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

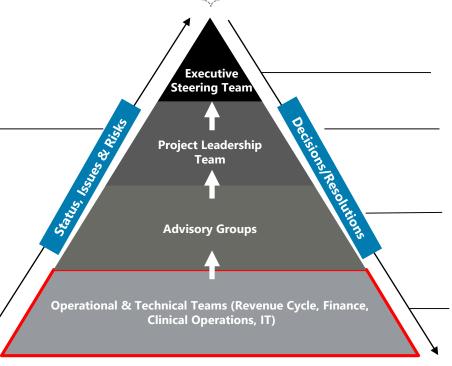
#### **Effective Decision Making**

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.

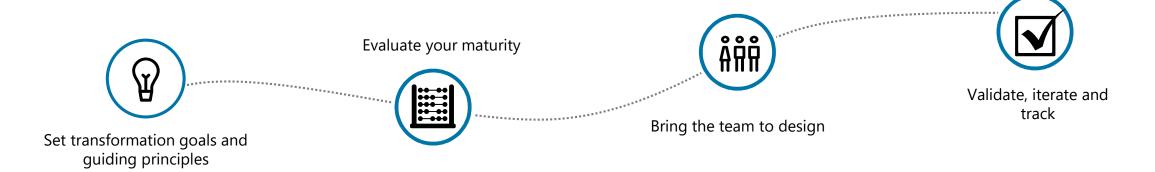
### **Standardisation and "Systemness"**

"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	Improved accuracy and consistency
Standardised Process	in reporting
Standardised Content	Better clinician and customer experience
Standardised Documentation Tools	System is built for ongoing
Standardised Measurements	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



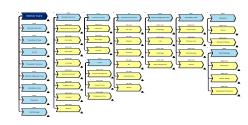
#### **Deloitte Workflow Accelerators (Illustrative)**







CapabilityEdge<sup>™</sup> Process Maturity



IndustryPrint<sup>™</sup>
Process Models



Workflow Inventory & Tracker

## Lessons Learned

### **Preparing to Transform**

#### Define

Document

Communicate

• Governance – Define the governance bodies, membership, and decision rights

### Digital Strategy

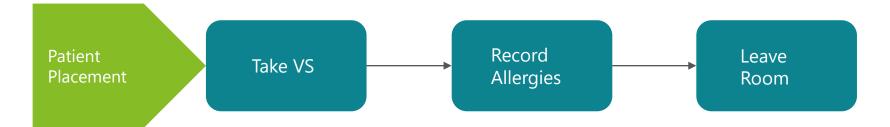
- What do you hope to accomplish?
- What should care look like?
- What is the experience for clinicians, staff and patients?

### 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

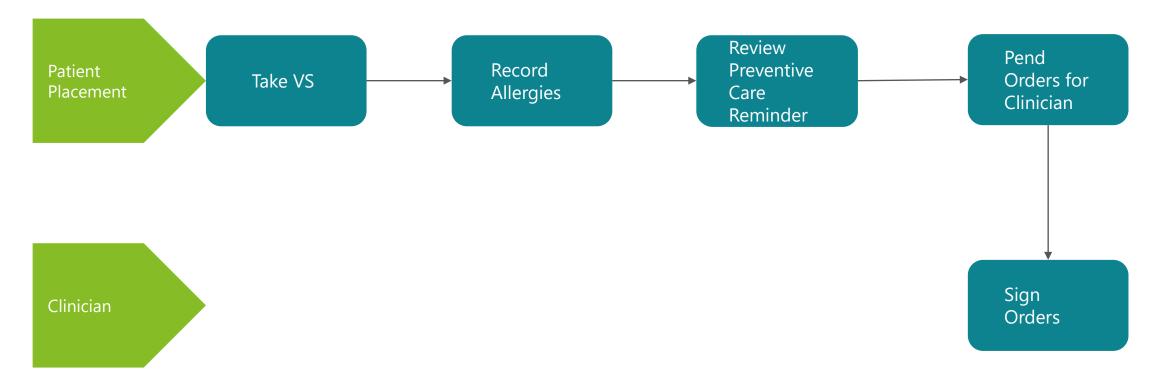
### **Achieving Transformational Goals**

Vendor Provided Patient Placement Workflow



### **Achieving Transformational Goals**

#### Preventive Care Excellence

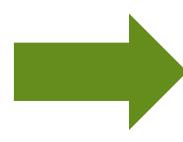


Guiding Principles inform the workgroups of opportunities to modify workflows to achieve organisational goals

### **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

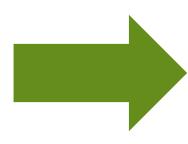
### Change Communication:

- 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



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#### **Services**

#### **Health System Reform**

- System Innovation
- Integrated Care
- Commissioning for Value
- New Organisational Forms

#### **Organisational Improvement**

- Performance Improvement
- Avoiding Financial Crisis
- Insight Driven Organisations

#### **Enabling Capabilities**

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



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# Change Management and Communication

**Thursday 29 April 2021** 

4:00 – 5:00 pm BST

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