Workflow Considerations

Workflow Area	Questions to Consider
Miscellaneous Questions to Consider	✍Are tasks clearly defined by job responsibility? ✍If not defined, would this be a good time to create this definition? ✍Do your staff members understand workflow? ✍Do you have workflow defined in a written format so that employees can refer to it, or is it ambiguous and exists with little definition? ✍Have you prepared your employees for a shift in thinking regarding going from paper to electronic, records? ✍Do employees understand that workflow from paper can be quite different in electronic format?
Messaging Questions to Consider	✍What is your current workflow and is it working? ✍How will you move from paper notes/ messages to electronic? ✍In paper when a message is complete, what do you do with the paper? ✍Do you want messages recorded in the Progress Notes Section of the chart, or do you want to define a new chart section?
Vitals Workflow Questions to Consider	✍How will nurses enter vitals into the chart ✍Do you want to record historical vitals in the chart, and if so, when will this be done? Ahead of training or after? ✍Proper methods for entering vitals (i.e. 5'6" or 5ft 6in.)
Nurse Note Workflow Questions to Consider	✍Will the nurse only be using Nurse notes? ✍Will the nurse need a special immunizations template setup ahead of time? ✍Do you need to add new immunizations to the pick list? ✍Will you need to modify the Nurse Telephone Template to meet the needs of your site?
Paper Workflow Questions to Consider	✍Can you speak to your 3rd party organizations (i.e. Hospitals, nursing homes, etc.) about getting your documents pushed to you in an electronic format? ✍Have you included transcriptionists in the overall workflow?
Laboratory Workflow Questions to Consider	If no interface, have you identified who will enter the labs into the chart? ✍If using an interface, have you identified what non-interfaced labs will still need to be entered by hand? ✍Have you thought about what parts of the labs you would like sent to the providers review bin? ✍If labs are critical (high or low), do you want to be notified through messaging?
History Workflow Questions to Consider	✍Who will enter the Past Medical History? ✍Who will enter the Family History? ✍Who will enter the Social History? ✍Do you want the history sections to be blank, or do you want to use pre-defined templates? ✍Who will enter the histories, the nurse or the physician? ✍Do you understand that when you enter info, you have the chance of modifying the existing histories and adding to or appending?
Existing Paper Charts Workflow Questions to Consider	✍How will you transition from paper to EMR? ✍What parts of the chart will you want to be converted to EMR? ✍Have you identified for your staff how to know if a chart has been changed to EMR so that next time the patient comes in, your staff knows to look for it on the shelf, or in the EMR? ✍What about a stamp that could be placed on the chart to identify that it is now electronic, i.e. a large red letter **E** ✍Have you thought about what to do with the paper chart once it is entered into EMR?
Pre-Training Workflow Questions to Consider	✍Is your staff familiar enough with Windows and your current systems that these issues will not slow down the EMR training? ✍Have all LOGINS, USER NAMES and PASSWORDS been pre-established, written down, and practiced prior to the training? ✍Do users know how to properly exit windows? Do they know how to properly exit the EMR? ✍Do they know who to call for internal technical support issues? ✍Has the staff been notified that during the training, there will be a lot of topics to cover, but will be learned over time?