## Workflow Considerations

<table>
<thead>
<tr>
<th>Workflow Area</th>
<th>Questions to Consider</th>
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| **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 practice? |
| **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 EHR?  
• What parts of the chart will you want to be converted to EHR?  
• Have you identified for your staff how to know if a chart has been changed to EHR so that next time the patient comes in, your staff knows to look for it on the shelf, or in the EHR?  
• 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 EHR? |
| **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 EHR 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 EHR?  
• 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? |