AAOA

PRACTICE RESOURCE TOOL KIT

Key Impactors of Patient Flow

Materials presented in this tool kit are intended as resource only and should not be construed as guidance

Key Impactors of Patient Flow

1. Scheduling
2. Office processes and staffing
3. Clinic layout
4. Technology

Understanding the foundations of patient flow
1. Demand and supply
   - Clinic consult, testing, and office procedure slots needed per day can be inferred from the number of appointments scheduled per day
   - Level loading appointment slots throughout the day and across the days of the week can help improve day to day flow
2. Scheduling to your demand
   - Creating schedules that accommodate your daily demand can improve patient flow
   - When unable to meet daily demand you can consider adding extra slots, hours, or days to accommodate demand
   - You may also need to consider adding APP support or new providers when your schedules are full and demand remains unmet

Developing a workflow that works for your practice
1. Previsit work
   - Pre-visit documentation completion by the patient can reduce staff check-in and rooming time
   - Nursing pre-visit evaluation and prep can expedite the exam process
   - Pre-procedure or pre-testing authorizations can be done ahead of time
2. Check in and registration
   - Standardize documentation and questionnaires
   - Consider automating self-check in via phone, online, or in office tablets/kiosks
   - Having a standard policy for managing late arrivals can reduce backlogs in clinic and facilitate clear expectations amongst patients and staff
3. Rooming
   - Shifting as much work out of the rooming process and into the pre-visit process can significantly reduce the patient's rooming time
   - Developing a consistent rooming process enhances your roomer's efficiency and can reduce the time to room a patient
4. Clinical evaluation or testing
   - EMR optimization and in-room documentation can reduce re-work
   - The addition of scribes (in-room, virtual, AI) can improve patient flow and potentially increase supply
5. Patient education
   - Templated or standard patient education materials that are integrated into the EMR can reduce the need the find and/or print materials
6. Checkout
   - Having dedicated checkout staff may reduce a bottleneck at the front desk where staff are trying to perform two functions

Optimizing clinic layout to meet your workflow
1. Consider separate waiting rooms for allergy and other patients
    - Separation allows for easier monitoring of shot patients for their observation period
2. Understand the movements of your patients and your team
3. Physician/Nurse/MA workspace
    - Creating a centralized location where the providers and staff work together can improve communication and help providers complete multiple tasks
    - Reducing steps between exam rooms and the centralized team space may improve provider flow
4. Room allocations
    - Proximity of allocated exam rooms and testing/treatment rooms may improve workflows and aid in patient flow

Using technology to gain efficiency in patient flow
1. Patient portals
    - Reduce phone calls and in-office education
    - Protect clinic exam slots by managing routine issues virtually
2. Automation
    - Pre-visit texting/emails
    - Pre-testing reminders

Patient Flow

Patient flow impacts a clinic's efficiency and correlates with patient, staff, and physician satisfaction. Some key factors include scheduling, office processes and staffing, clinic layout, and technology.

Foundations

Developing a clear understanding of your patient demand for clinic visits, allergy tests, and immunotherapy treatments serves as the foundation to patient flow. Practices that track the volume of scheduled visit types per day can use this information to predict the number and type of visits needed. These visits can then be spaced throughout the day and week to help minimize patient congestion in testing, treatment, or exam areas. Trending of this information can also be used to guide staffing throughout the day as well as predict the need to add new providers. In the example image below which shows the number of patients getting a practice manager could use the information to identify peak times of day and peak days of the week to prepare for higher volumes of allergy shot patients.
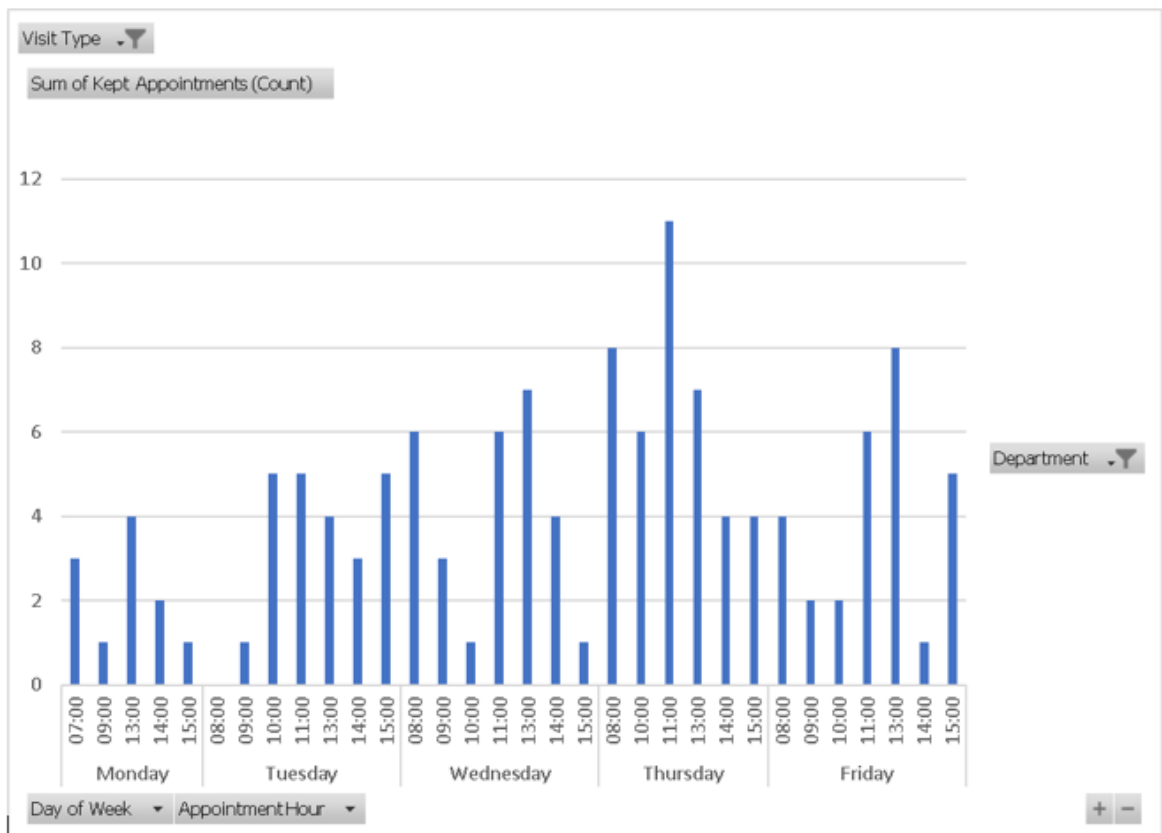

Figure 1. Number of patients receiving allergy shots per hour and by day of the week at one practice location.

Mapping Flow

Mapping your patient's experience and understanding how each component of the patient visit impacts flow will inform the practice management where improvement opportunities exist. Typically, a patient's visit experience includes pre-visit work, check-in/registration, rooming, clinical evaluation/testing, patient education, and checkout. To optimize your practice you may want to delineate workflows for standard clinic visits, allergy visits, allergy testing, and allergy shots.

Pre-visit

For your registration staff, having patients fill out registration information, pre-visit screenings tools, and check-in documentation prior to their arrival shifts this work out of the clinic and expedites the patient's preparation for the examination. When possible, pre-certification for testing or procedures should also be done before the patient's arrival. Likewise, having a standard policy for managing late arrivals can reduce backlogs in your clinic and facilitate clear expectations amongst patients and staff.

Check-in

Developing consistent patient questionnaires and pre-exam assessments reduces variability and streamlines in-office processes. You might also consider automating the check-in process either by phone, online, or in the office (kiosk, tablet, etc) to reduce front desk congestion and enhance patient flow through the registration process.

Rooming

For your clinical staff, creating a consistent rooming process and optimizing in-room documentation can reduce re-work while also minimizing the roomer's time in the exam room. Utilization of drop down menus, smart phrases, or templates are great ways to create efficiency of process while generating trackable data.

Exam/Test

For physicians and APPs, direct entry or utilization of scribes (in-person, virtual, or AI) may enhance the patient experience and help decrease your time spent in the electronic medical record. Keep in mind that the added cost of a scribe should be evaluated against the improvement in provider lifestyle and/or against the number of "extra" patients per day needed to offset that expense.

Educate

For education, adding templated information into the EMR and/or standardizing printed education materials for distribution at checkout can speed up the discharge process. Having such standardized materials for your patients to review will help your staff create a consistent education experience and reduce follow up phone calls.

Check-out

Once the clinical component of the visit is complete the checkout process may be more efficient if there are staff dedicated only to check out: scheduling follow up, scheduling additional testing, and handing out important documentation. When check in and check out functions are performed by the same personnel in a busy practice it may lead to a backlog at your front desk.

Clinic Space Utilization

First, consideration should be given to separate waiting rooms for your allergy patients and for your other clinic patients. Having a dedicated waiting room for your allergy shot patients will allow your staff to more easily monitor patients and identify potential reactions.

Second, LEAN methodology adopted from Toyota suggests that the ideal operational cell flow is that of a "U". Check in, then loop around to include waiting area, exam room, testing, then check out such that each patient continues forward progress and there is no doubling back. If you can optimize your clinical space it may be helpful to assess the movements of your patients, staff, and providers as they manage patients in your clinic. By identifying how your team moves throughout the clinic, you can then move personnel or re-design your facilities to improve efficiencies. When the ideal is not possible, allocating rooms and provider workspace in such way as to accomplish minimal steps by the patient, staff, and providers will help patients flow through your practice more efficiently while also minimizing staff and provider non-value-added time.
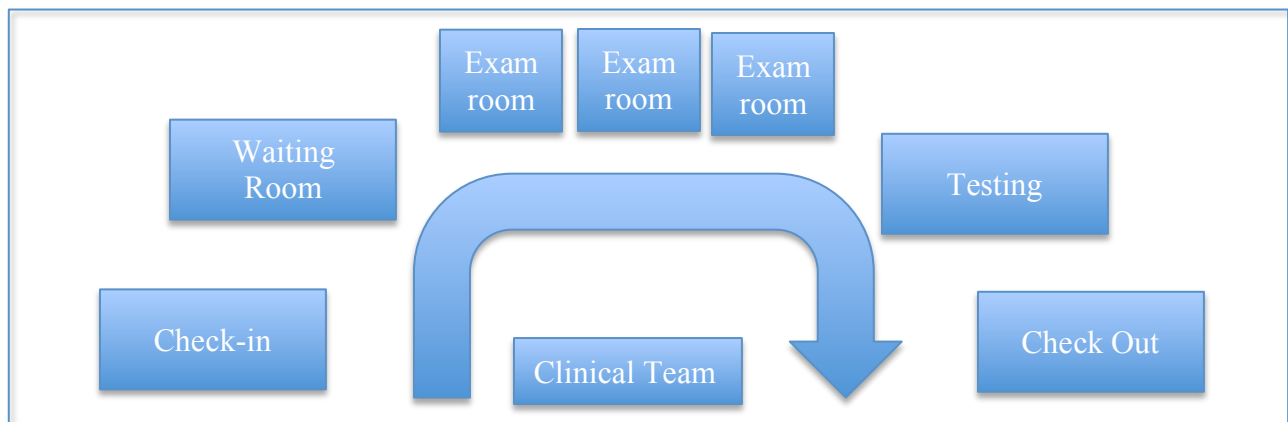
Figure 2. LEAN methodology suggests that the ideal operational cell flow is a U shape.
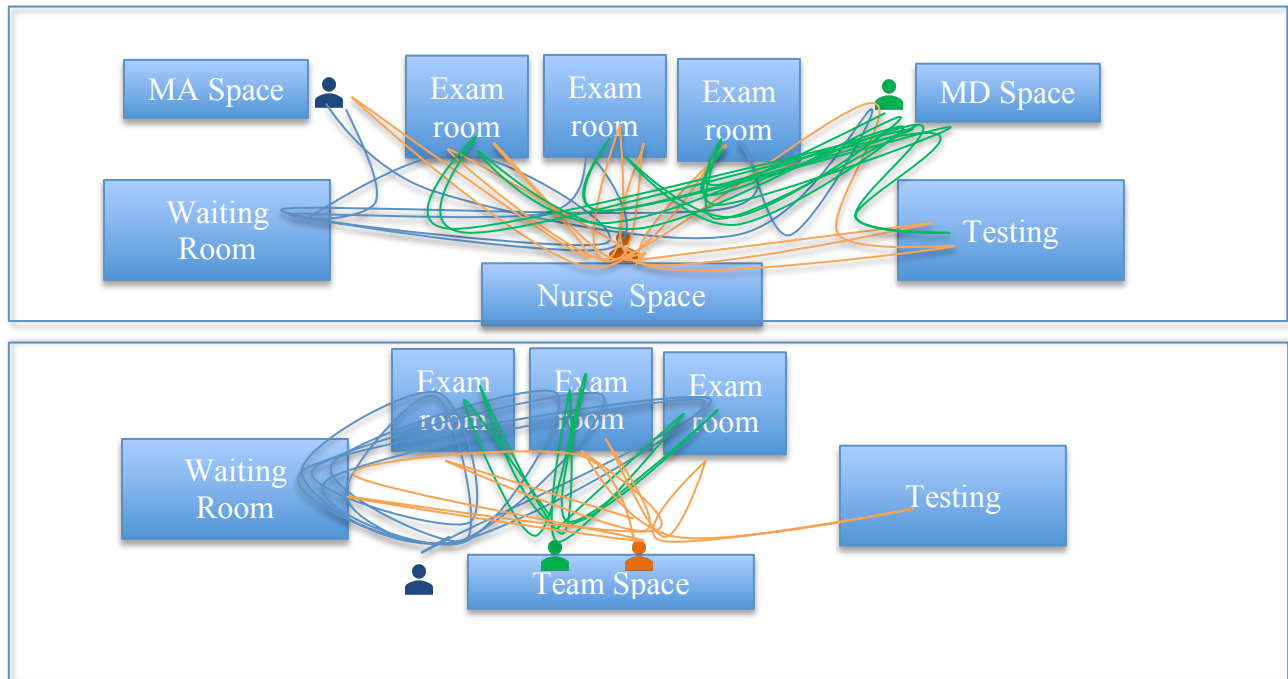
Figure 3. Tracking your staff and physician movement around the clinic can help identify ways to improve flow.

Technology

Lastly, technologic advances in EMR portals and clinic automation may serve as way to improve patient flow. By taking advantage of your EMR's secure messaging tools and using third party services that provide phone or texting reminders you may be able to reduce late arrivals, delays in registration, or incomplete pre-visit documentation. In addition, some insurance carriers now cover electronic visits. If your office is able to support such visits it may prevent routine patient care issues from taking up valuable slots in your clinic schedules. In addition, there are some vendors that offer tools to enhance allergy practice management including registration, check-in, safe mixing practices, inventory management, and analytics. Companies like Audigy, Fuel Medical, or Xtract may allow you to digitize portions of your patient experience and improve flow through automation.

AAOA Practice Resource Took Kit