



Your Step-by-Step Guide To Optimizing Your Clinical Documentation Workflow

Essential ways to reduce processing time, improve the quality of your output, and eliminate waste.



Introduction

Clinical documentation captures the patient story through every health care encounter. Documentation accuracy is essential to fostering high quality patient care, demonstrating compliance with quality measures at the facility, and supporting financial outcomes.

In a healthcare setting, inaccurate or delayed documentation has the potential to create care delays, require repeat tests and provider interactions, and even drive incorrect diagnoses. In addition, documentation challenges disrupt the revenue cycle -- from reimbursements and the bottom line. If these challenges are neglected or pushed simply to downstream systems, they can become more complex and costly to correct, pose significant regulatory repercussions, and create havoc with a healthcare organization's ability to operate, communicate, and support its stakeholders.

Closing the inefficiencies gap in clinical documentation processes is imperative. How can organizations improve the quality and integrity of the documentation processes to better support their operational efforts? **Continue reading to explore our practical seven-step guide on – assessing your existing documentation workflow and how you can optimize it through efficiently managed workflow redesign.**

When organizations streamline documentation processes, they experience measurable benefits:



Reduced processing time



Improved output quality



Eliminate waste



1. Assessment



Questions to Ask

- What are the goals of your process?
- Which tasks are involved and who performs them?
- Which tasks have prerequisites or inputs from resources outside of the current process?
- What technologies are used, if any?
- Who receives the output from a task?
- Who needs to be informed about the status?
- When is a process complete?

A thorough understanding of your existing processes sets the stage for potential improvements. Using process mapping methodologies to assess your documentation process can help generate that level of understanding.

Identify all goals, tasks, people, and resources required – along with any other elements of your documentation process. A process map or a visual depiction of a process is an excellent tool for ongoing improvement initiatives, enabling you to continually re-assess efficiency, identify bottlenecks, and outline dependencies.



2. Analysis



Questions to Ask

- Are there any gaps in our process?
- What obstacles can we remove?
- Do we have too few resources? Too many?
- In what situations do we typically miss deadlines?
- Where or when do we tend to experience quality issues?
- In what areas do we have challenges with accuracy or completeness?
- Are there opportunities to outsource tasks and generate better results?

Analyzing your process map enables you to answer the most important question: What problems are you trying to solve? The analysis allows you to gain insight and identify obstacles, weaknesses, and points of inefficiency and waste. With your process mapped, early opportunities for improvement may become readily apparent. Maps provide clear visibility into problems that are often buried in the minutiae of tasks.

For example, if information needed to complete documentation is stored on someone's hard drive, and a transcriptionist must wait for someone to send the file to them, rather than accessing it through a shared repository or workflow queue, this delay can stall the entire process and create efficiency issues.



3. Automation and Standardization



Questions to Ask

- What steps or strategies provide the best results today?
- Which team members generate the most reliable results?
- What tools or technology are available to foster better efficiency?
- How will proposed changes affect performance: quality, timeliness, accessibility?
- What risks might potential changes introduce, and how should we mitigate them?

Redesigning your documentation process often includes two areas of focus. First, leveraging technology offerings to automate and streamline manual tasks which can allow you to perform more efficiently and make documentation less time-consuming. Think of new artificial intelligence (AI) tools, workflow management platforms, and document repositories. Even existing software can be fine-tuned to improve performance.

Second, standardizing the way documentation tasks are performed enables you to replicate the strategies that deliver the best results through your entire process. When handled correctly, standardization ensures every member of your documentation ecosystem knows what to expect and how to perform the task at hand.



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When developing a documentation strategy, seven elements serve as the foundation of an organization's model and plan: cost, efficiency, standardization, scalability, and transformation.

Blending those elements in the right measurements, at the right time, with the right focus is the key to generating success for our clients.”

Maria French, CEO, Terra Nova



TERRA NOVA

4. Control Mechanisms



Questions to Ask

- What policies and processes do we need to have in place?
- How will we communicate the plan?
- What do my team members need to know about their updated roles and tasks?
- How will we manage the pushback that comes with any change?
- How will we manage accountability? Which “carrots” or “sticks” should guide the right behavior?

Once you have determined the scope of the process changes you plan to make, it is important to set up your organization for success.

Use this pre-launch opportunity to update your policies, provide training to team members, and create an accountability plan.

To that end, develop comprehensive internal reporting policies and procedures that are consistent with required documentation quality and coding guidelines and reimbursement regulations. When the new plan is developed, review it with stakeholders and management and adjust as appropriate.



5. Transformation



Questions to Ask

- Where is the best place to start?
- What new resources need to be in place as we begin?
- Have we tested the configuration of new tools?
- How will we gather feedback from participants and stakeholders?
- Assuming success with a proof of concept, how will we roll out the changes to the remaining areas?

You've assessed your process, analyzed your situation, determined the changes you'd like to make, and put controls in place. As you prepare to implement your plan, consider starting small. Implementing a “beta test” or “proof of concept” for a segment of your documentation process can help in three important ways.

First, it allows you to learn and adjust without affecting the broader operation. It also reduces anxiety for team members who have an opportunity to learn from others who are using the new process. Finally, it enables you to demonstrate early success to stakeholders, which can bring valuable leadership-level support.



6. Reporting



Questions to Ask

- What are our performance goals?
- What KPIs will we use to measure performance?
- How often will we provide reports and updates to stakeholders?
- How will we communicate the successes and lessons learned to team members?
- How will the report data inform our roll out to the broader organization?

Whether you've implemented a proof of concept or an entire program, measuring and reporting your results is essential.

Participants, clients and internal stakeholders, and management teams all have a vested interest in the success of your workflow redesign plan. If your documentation is delivered to the same audience regularly, surveying for quality, turnaround time, performance indicators, and overall physician satisfaction can add value to your internal reporting capabilities.

Moreover, things don't always go according to plan, and there could be some unexpected hurdles to overcome. Frequent monitoring allows you to manage challenges and verify results.



7. Continuous Improvement



Questions to Ask

- Is there a problem with current performance?
- Are there areas of unnecessary duplication or redundancy?
- How much time providers are spending in doing administrative tasks in EHRs?
- Do you need a fail-safe mechanism in case the process breaks down?
- Is there a more logical way to sequence the steps?
- What skills are necessary to perform each step?
 - If more skills are required, can current staff be trained or do duties need to be shifted to more qualified staff?
 - Could someone be hired to perform this step?
 - Could this step be outsourced?
- Are you thinking outside the box? Is there an entirely different way to get this done?

Evolving regulations coupled with challenges associated with value-based care, the clinical documentation is only going to become more complex. In addition to implementing and sustaining new workflow design, continuous quality improvements eliminate waste and optimize steps that add value.

New documentation process may require realigning roles and responsibilities to fit the redesigned workflow. This, in turn, will require regular updates to policies and procedures, job descriptions, training, collaboration tools, and reporting systems.



Terra Nova's documentation services are designed around the seven optimization elements outlined in this guide.

Our process aims to improve existing clinical workflows to help reduce operating costs, boost-quality, enhance functionality with upgraded technology, and to bring focus to other factors to ensure maximum efficiency.



Connect with a Terra Nova expert today.

Call 888.600.4178 or visit us at [TerraNovaNow.com](https://www.TerraNovaNow.com).

We can help you map your existing process, identify gaps and obstacles to quality, turn-around time (TAT), and accuracy – and implement a successful documentation program that has a lasting impact on your bottom-line.

