

## High Leverage Changes for Office Efficiency

The following table includes strategies that could be used to help you achieve your office efficiency aims. Please remember that not all strategies will apply to every clinic, so consider the ones that you feel would be most beneficial in your situation.

Balance Supply and Demand for Non-Appointment Work			
Idea/Strategy	Person Responsible	Timeline	Comments
<input type="checkbox"/> Flow-map the patient journey across the office			
<input type="checkbox"/> Measure cycle times			
<input type="checkbox"/> Do a walk-around the clinic and record your observations			
<input type="checkbox"/> Begin a care team workload analysis (look at who does what in the clinic)			
<input type="checkbox"/> Plan to study daily demand for non-appointment work (phone calls, emails, etc.)			
<input type="checkbox"/> Use the concept of one-piece flow versus batching to match the work			
<input type="checkbox"/> Study and understand support staff supply			
<input type="checkbox"/> Separate responsibilities for phone triage, patient flow and paper flow			
<input type="checkbox"/> Map specific support processes and improve them			

<b>Balance Supply and Demand for Non-Appointment Work</b>			
<b>Idea/Strategy</b>	<b>Person Responsible</b>	<b>Timeline</b>	<b>Comments</b>
<input type="checkbox"/> Develop a philosophy of doing this moment's work this moment			
<input type="checkbox"/> Other ideas			

<b>Synchronize Patient, Provider and Information</b>			
<b>Idea/Strategy</b>	<b>Person Responsible</b>	<b>Timeline</b>	<b>Comments</b>
<input type="checkbox"/> Ensure that patient, provider, room and information are all available at start of visits			
<input type="checkbox"/> Analyze the flow of all critical components: patients, providers, information, staff, equipment and rooms			
<input type="checkbox"/> Start morning and afternoon clinic sessions on time			
<input type="checkbox"/> Develop a script for patient arrival and scheduled-with-provider times			
<input type="checkbox"/> Do an interruption study and devise a plan to limit interruptions, especially of providers			
<input type="checkbox"/> Use health prompts/reminders to anticipate full potential of today's appointment needs (max-packing)			

<b>Synchronize Patient, Provider and Information</b>			
<b>Idea/Strategy</b>	<b>Person Responsible</b>	<b>Timeline</b>	<b>Comments</b>
<input type="checkbox"/> Use a “chart check” to ensure all information is correct			
<input type="checkbox"/> Develop mechanisms to keep rooms open and ready			
<input type="checkbox"/> Use rooming criteria to ensure patients are prepared for the visit			
<input type="checkbox"/> Collect data to produce a minutes-behind graph			
<input type="checkbox"/> Use scheduled pauses to apply a continuous flow approach to non-appointment activities (e.g. returning phone calls)			
<input type="checkbox"/> Consider abbreviated checkout for selected patients (e.g. patients who don't need a follow-up appointment)			
<input type="checkbox"/> Other ideas			

<b>Predict and Anticipate Needs</b>			
<b>Idea/Strategy</b>	<b>Person Responsible</b>	<b>Timeline</b>	<b>Comments</b>
<input type="checkbox"/> Develop a plan for scheduled team meetings			
<input type="checkbox"/> Determine a decision-making process			

<b>Predict and Anticipate Needs</b>			
<b>Idea/Strategy</b>	<b>Person Responsible</b>	<b>Timeline</b>	<b>Comments</b>
<input type="checkbox"/> Use regular “huddles” to anticipate and plan for contingencies			
<input type="checkbox"/> Communicate among care delivery team throughout the day			
<input type="checkbox"/> Develop a plan for late patients			
<input type="checkbox"/> Develop a plan for late providers			
<input type="checkbox"/> Plan for procedures and other “unusual” appointments			
<input type="checkbox"/> Plan for expected and unexpected interruptions in flow			
<input type="checkbox"/> Do as much as possible with standard protocols			
<input type="checkbox"/> Other ideas			

<b>Optimize the Environment</b>			
<b>Idea/Strategy</b>	<b>Person Responsible</b>	<b>Timeline</b>	<b>Comments</b>
<input type="checkbox"/> Use open rooming to maximize flexibility			
<input type="checkbox"/> Standardize exam rooms (same supplies and equipment in same place in every room)			
<input type="checkbox"/> Keep rooms fully stocked at all times (use triggers to signify when supplies getting low)			
<input type="checkbox"/> Develop plans to know the location of limited equipment at all times			
<input type="checkbox"/> Co-locate staff and equipment if possible			
<input type="checkbox"/> Cross-train staff			
<input type="checkbox"/> Other ideas			

<b>Manage Constraints</b>			
<b>Idea/Strategy</b>	<b>Person Responsible</b>	<b>Timeline</b>	<b>Comments</b>
<input type="checkbox"/> Define all roles and responsibilities			

<b>Manage Constraints</b>			
<b>Idea/Strategy</b>	<b>Person Responsible</b>	<b>Timeline</b>	<b>Comments</b>
<input type="checkbox"/> Identify the constraint (person or process)			
<input type="checkbox"/> Drive unnecessary work away from the constraint			
<input type="checkbox"/> Re-allocate work to appropriate level of skill, expertise, licensure			
<input type="checkbox"/> Reassess forms for ease of completion (check-off boxes, etc. rather than the need to write text)			
<input type="checkbox"/> Flow map all provider support processes and look for leveraging opportunities			
<input type="checkbox"/> Other ideas			