Document Management
Are you ready for Workflow?



Healthcare Improvement Scotland

NHS SCOTLAND



- Practices can consider Workflow Optimisation as a means of reducing GP administration and freeing up time.
- By enabling administrative and reception staff to deal with some clinical correspondence, GP time spent unnecessarily on duplicate letters, appointment arrangements and “for information only” correspondence can be reduced. Delegating this task to admin staff enables GPs to spend more time on more complex correspondence, patient follow-up and higher value clinical work.
- Administrative staff, once trained, supported by the GP team and following a clear set of protocols, can find this task empowering and rewarding; giving a greater sense of responsibility and ownership.
- There are many tools available to help practices introduce Workflow Optimisation, but are you ready?

This Tool uses a traffic light system to help you determine whether your practice is ready for Workflow

If any of your answers are GREEN, you maybe wouldn't see a benefit of this work.

It doesn't mean you shouldn't start, but you should discuss with GPs.

If any of your answers are ORANGE, you need to consider these points when approaching the work.

It doesn't mean you shouldn't start, but you need to be mindful of the shift from GP workload to administrative staff workload.

You may need to consider staff training before you begin the work.

If any of your answers are RED, your practice may not be ready for the project.

You should consider all of the red areas before starting any workflow projects.



If most of your answers were black, it's time to start Workflow! ☺



To find out if your practice is ready for Workflow Optimisation, circle YES or NO to the following questions

Do you currently have any unfilled admin or reception staff vacancies?	**YES** / **NO**
Do you have higher than average levels of sickness absence?	**YES** / **NO**
Do you have time to gather data on the types and volumes of correspondence you receive as a practice?	**YES** / **NO**
Are you prepared to integrate this extra task into admin/reception workload and potentially increase hours?	**YES** / **NO**
Are admin staff competent coders?	**YES** / **NO**
Do you have admin staff with a good knowledge of medical terminology?	**YES** / **NO**
Do your GPs easily get through their workflow each day?	**YES** / **NO**



To find out if your practice is ready for Workflow Optimisation, circle YES or NO to the following questions

Are your GPs stressed and struggling with demand?	**YES / NO**
Do your GPs like to see everything for each patient?	**YES / NO**
Do your GPs have the same attitude to workflow? (for example, would they all agree on the same protocol?)	**YES / NO**
Do your staff feel nervous taking on new responsibilities?	**YES / NO**
Do your staff find it difficult to work away from reception without interruption?	**YES / NO**
Do you have an established Practice Manager/cluster network?	**YES / NO**

Please look back on the **colour** of your answers and use the key below to determine your readiness for Workflow

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Published July 2019



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