Telehealth 101

Developing Workflows & Processes

Lara Oktay
Operations Manager, Office of Telemedicine
University of Virginia Karen S. Rheuban Center for Telehealth
Charlottesville, Virginia
Developing Workflows & Processes

What
How
Who
When
Why
Developing Workflows: What

• **Workflow**: the definition, execution and automation of processes where tasks, information or documents are passed from one participant to another for action.

• **Workflow Documentation**: outlines the steps necessary to complete a task or process.

• **Workflow Diagram or Process Flow Diagram**: a graphical representation depicting the flow of tasks or actions from one person or group to another. Typically consists of symbols representing actions connected by arrows indicating the direction.
Developing Workflows: How

• **Type**
  • Detailed
  • Overview

• **Applications**
  • Word
  • Powerpoint
  • Visio

• **Template**
# Developing Workflows: How Workflow Documentation

<table>
<thead>
<tr>
<th>Originating Site (Patient Location)</th>
<th>Distant Site (Specialty/Clinician)</th>
<th>Telemedicine</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A. Consult Request:</strong></td>
<td><strong>A. Consult Request:</strong></td>
<td><strong>A. Consult Request:</strong></td>
</tr>
<tr>
<td>1. Submit</td>
<td>1. Consult Request:</td>
<td>1. Consult Request:</td>
</tr>
<tr>
<td><strong>B. Consult Validation:</strong></td>
<td><strong>B. Consult Validation:</strong></td>
<td>2. Consult Validation:</td>
</tr>
<tr>
<td>1. Remind patient of appointment</td>
<td>2. Confirm with patient the week of the appointment</td>
<td>3. Consult Preparation:</td>
</tr>
<tr>
<td>2. Confirm with patient the week of the appointment</td>
<td><strong>C. Consult Preparation:</strong></td>
<td>4. Consult Preparation:</td>
</tr>
<tr>
<td><strong>C. Consult Preparation:</strong></td>
<td><strong>D. Performing Consult:</strong></td>
<td>5. Performing Consult:</td>
</tr>
<tr>
<td>1. Patient Documentation</td>
<td>1. Notification of Patient arrival</td>
<td>6. Consult Conclusion:</td>
</tr>
<tr>
<td>2. Confirm equipment is on and operational</td>
<td>2. Physician will connect when ready</td>
<td><strong>E. Consult Conclusion:</strong></td>
</tr>
<tr>
<td><strong>D. Performing Consult:</strong></td>
<td><strong>F. Consult Cancellation:</strong></td>
<td>3. Requesting NP/Hospitalist should facilitate consult</td>
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Developing Workflows: How

• **Flowcharts**
  • Symbols
  • Colors
  • Detail

**Basic Flowchart**

![Basic Flowchart Diagram](image-url)
Developing Workflows: How Swimlane Flowcharts
Developing Workflows: Who

• Skillset
• Subject Matter Experts
• Group vs Individual
Developing Workflows: When

• Beginning
• Middle
• Never the End
Developing Workflows: When

• **Project Management Process**
  • Assess
  • Prioritize
  • Goals
  • Accountability
  • Evaluate & Review

• **Project Management Methodologies**
  • Microsoft Project, Waterfall, Critical Path, Agile, PMI/PMBOK, Scrum, Kanban, Extreme Project Management, Lean, Six Sigma, Prince2, etc.
Developing Workflows: Why

• Workflow or not to Workflow
  • Pros
  • Cons