

# Workflow Optimisation

## Utilising the skills of Admin Staff to support Improvements in Primary Care

### The Challenge

Administrative tasks take up large chunks of GP time and are often the reason GPs stay late at work. Larger practices in Forth Valley routinely receive over 100 documents per day; many containing duplicate or excessive information. In early 2018, Stirling & Clackmannanshire and Falkirk Health & Social Care Partnerships submitted a joint application to Healthcare Improvement Scotland's (HIS) funded pilot known as the Practice Admin Staff Collaborative (PASC). PASC provided the opportunity to work with other HSCPs across Scotland to test, develop and implement solutions to document management and other issues affecting primary care.

### Our Aim

Workflow Optimisation (WFO) is an established technique, whereby skilled admin staff safely manage a large majority of incoming documentation. Initially working with 3 clusters, we set an aim to reduce the number of documents sent to GPs daily and also increase the capability and capacity of admin staff.

**By March 2019, all practices that have identified as 'ready' will reduce documents reaching a GP by minimum 50% using a safe process (not including diagnostic results).**

### Methodology

#### Stage 1 – Understand the System

Each practice used an audit tool to count the number of documents incoming each day (paper & electronic) and plotted the data to show their baseline. Practices mapped their current process to highlight any skill gaps or opportunities for change ideas.

#### Stage 2 – Identify Workflow Managers

Practice Managers identified admin staff that would be willing and capable to start WFO, or if additional capacity was required.

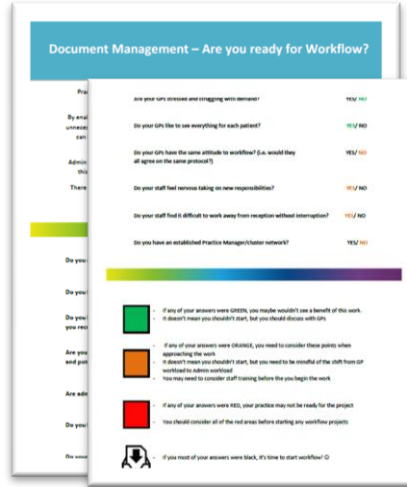
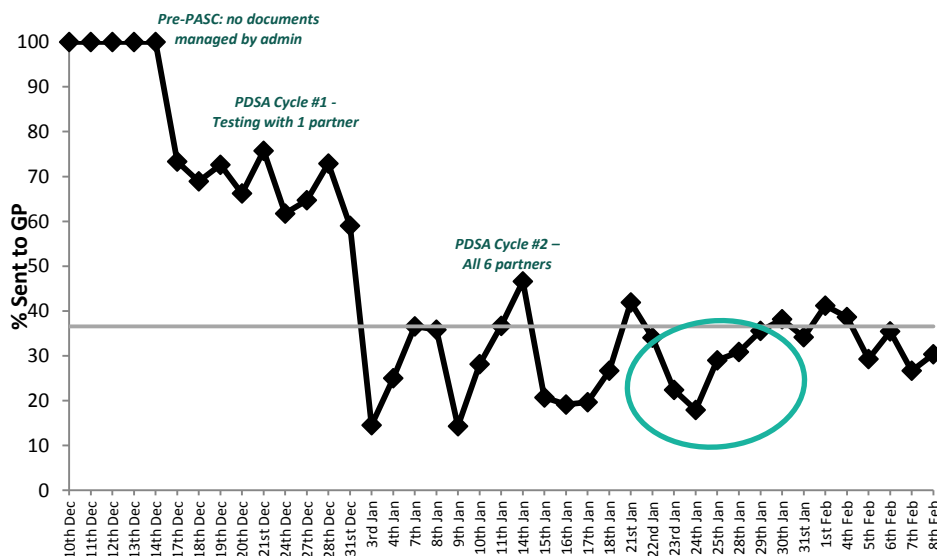
#### Stage 3 – Develop and Test a Protocol

Local GP's developed a protocol which was then shared wider. Practice teams amended to suit their needs, using rapid PDSA cycles throughout the testing phase.

#### Stage 4 – Maintain a Safe Process

Practices implemented audit processes to ensure safety throughout. Most practices implemented an audit 'rota' to review a random selection of documents each week and amended the protocol with any learnings.

Figure 1 – Run Chart showing the % of Documents Sent to GP each day from Practice Example 1:



80+ admin staff at a protected learning session developing tools for their own practice. The 'Readiness Tool' (left) was developed to ensure practice staff had considered key issues including staffing and skill mix, before attempting to implement workflow optimisation. WFO is a shift of workload, not an elimination; therefore it is crucial practices have enough admin capacity to manage the process.

### Impact on Practices

#### Practice Example 1:

City based, 7000 pts

Pre Workflow = 100% of documents to GPs (around 70 per day)

Post Workflow = 38% documents to GPs (around 25 per day)

GP Lead: "this has been a revelation in our practice!"

"Workflow has made a huge difference to the way that we structure our day. The clinical information that is now sent consists of the letters and results that we need to see."  
Dr Paul Baughan

"Our work life balance is so much better as a result, but it has also really improved the dynamic in the practice. GPs have had to let go and remember that they are not the right person for every task!"  
Dr. Fiona Johnstone

"I think this has had the single biggest impact on my daytime stress"  
Dr. Marianne Herron

### Outcomes

Number of documents sent to GPs each day has reduced by an average 65% across participating practices.

Practice Managers continue to lead PASC programme and are now also leading key areas of the Primary Care Improvement Plan.

Working with lab teams to determine better processes at the point of testing. Phase 2 will focus on workflow of diagnostic results.

Agreement for roll out to the next 5 clusters in Forth Valley; including formal education sessions. The PASC programme also includes Signposting, which has been a huge support to practices.

In conclusion, the implementation of Workflow Optimisation in GP practices has made a substantial improvement; not just to document handling, but to the overall efficiency of the team. Practices are utilising the skills of admin staff and developing their teams further, to ensure patients get the best possible service and care.