Vancouver
Division of Family Practice
An FPSC initiative

Clinic Grants Program 2024-2025

List of Program Descriptions and Outcomes - "Clinic Workflow" Focus Area

In their End of Project Reports, many clinics expressed a strong interest in learning about the projects completed by other clinics. Below is a comprehensive list of Clinic Workflow project descriptions and outcomes, as reported by the clinics.

References to specific names of clinics or individuals have been removed for privacy.

Operational Efficiency Optimization

Description

The objective of this project was to streamline and improve the workflow and organizational structure of the clinic. This involved refining existing systems and implementing targeted improvements across several key areas, including patient experience, clinic operations, and the patient-physician relationship. The project encompassed software upgrades, physical and aesthetic renovations to the clinic space, and the development of structured procedures to guide staff through various scenarios, ensuring consistency and operational efficiency. The overall goal was to optimize patient time spent in the clinic, enhance service delivery, and create a more cohesive and welcoming environment.

Outcomes Achieved

As a result of this project, several significant outcomes were achieved. Workflow efficiency was greatly enhanced through the optimization of clinic systems, the introduction of structured procedures to guide staff, and improvements to physician workflows. Physicians now have access to more reliable and efficient computers, allowing them to work more quickly and with less stress, resulting in faster and more reliable task completion. Additionally, physical renovations and software upgrades created a more streamlined and comfortable environment for both staff and patients. Overall, the clinic experienced improved operational efficiency, reduced wait times, and increased staff satisfaction, contributing to a more productive atmosphere.

Improving Patient Access to Online Appointment System

Description

Establish online appointment system for our patients.

Outcomes Achieved

We have registered patients for online booking system; they now have access to our office schedule 24/7. They can book appointments online at their convenience. Staff has more time to concentrate on other office work.

Updating Website and Booking Protocols

Description

Since switching to the Longitudinal Family Practice (LFP) model, we've had changes in the workflow of our appointment bookings. Lots of patients are complaining that they cannot book with us because they already have a family doctor. We would like to make our website and booking protocols more client friendly to advise them of the changes mandated by the new policies as a consequence of the LFP model. We will be able to better orient the patients to the appropriate health care resources should they not be able to book at our clinic. This would be making it clearer where the Urgent Care Centers are located or advising them to seek care at their family physician's office.

Outcomes Achieved

Better streamlining of our patients. The patients that don't have a family doctor are now sent to the UPCC for care. The patient that have a family doctor are asked to follow up with them. Only our own patients can book appointments with our doctor. This is in agreement with the wishes of the Ministry of Health.

Enhancing Patient Experience Through Optimized Clinic Workflow

Description

Introduction:

Clinic is proud to report the successful implementation of the Enhanced Clinic Workflow Project.

Enhanced Clinic Workflow Project:

this initiative aimed to streamline operations, enhance patient satisfaction, and improve staff efficiency.

Outcomes Achieved

Key Achievements: Streamlined Operations: Reduced patient wait times by 32%.

Enhanced Communication: Call answer rates improved by 40%, minimizing unmet patient needs.

Increased Online Engagement: Online bookings accounted for 45% of all appointments.

Operational Efficiency Gains: Automation reduced repetitive administrative tasks, boosting staff efficiency. Improved Through innovative strategies and shared investment, we have achieved measurable improvements, meeting and exceeding our project objectives.

Enhanced Scheduling and Workflow Optimization: We revamped the appointment scheduling process, introducing predictive tools to optimize time slots and reduce overbooking.

> Outcome: Patient wait times were reduced by an average of 32%, surpassing the 30% reduction target.

Call Answer Rate Improvement: A Key Performance Indicator (KPI) system was implemented for MOAs to track and reward call-answering efficiency. Monthly recognition was introduced for top-performing MOAs.

> Outcome: Missed calls decreased by 40%, significantly enhancing communication and reducing patient frustration.

Online Booking Utilization: A user-friendly online booking platform was launched and promoted through clinic communications, reducing reliance on phone bookings.

> Outcome: 45% of appointments are now booked online, exceeding the target of 40%. This shift has reduced administrative workload and increased patient convenience.

Automation of Administrative Tasks: Routine processes, including appointment reminders, follow-up notifications, and patient records management, were automated using advanced clinic management software.

Outcome: Staff reported a 20% reduction in time spent on repetitive tasks, enabling greater focus on patient care.

Patient Feedback Collection: A comprehensive feedback system was implemented, combining in-clinic prompts, digital surveys, and follow-up emails to gather actionable insights.

Outcome: Patient satisfaction scores improved by 25%, reflecting better responsiveness to their needs.

Staff Engagement and Productivity: Monthly KPI recognition and a streamlined workflow fostered a positive work environment and increased MOA productivity.

Outcome: Staff engagement scores improved, with positive feedback on the new processes and recognition system. Key Achievements: Streamlined Operations: Reduced patient wait times by 32%.

Stronger Staff Engagement: Positive feedback from MOAs on the KPI system and new workflows highlighted the success of our efforts to empower staff.

Enhanced Communication: Call answer rates improved by 40%, minimizing unmet patient needs.

Increased Online Engagement: Online bookings accounted for 45% of all appointments.

Operational Efficiency Gains: Automation reduced repetitive administrative tasks, boosting staff efficiency.

Improved Patient Satisfaction: Satisfaction scores increased by 25%, exceeding our 20% target.

Conclusion: The implementation of the Enhanced Clinic Workflow Project has been a resounding success, transforming operational efficiency and patient care at clinic. The measurable improvements in wait times, communication, and patient satisfaction highlight the project's value and sustainability.

Acknowledgement: We extend our gratitude to the funders who made this project possible and to our dedicated staff for their commitment to creating a better patient-centered experience.

Referral Flow Updates & Documentation

Description

Referral workflow to specialists, clinics, palliative care and hospice. I created a mind map with links to various clinics and specialists. Through the process, I have increased communication with my MOA. Both become more aware of the referral flow.

Outcomes Achieved

Increased communication between doctor and MOA helped office workflow. Consultation and e-forms in JUNO/ Oscar EMR got updated.

Implementation of AI Scribes, Online Booking & Patient Forms

Description

Medical Clinic policy and AI scribes, building consent form, patient intake form, online booking with Ocean, patient health education material which is built in our website.

Outcomes Achieved

Enhanced patient access and improved continuity of care.

eFax System, Patient Self Check-In & Booking Enhancements

Description

We established a call and fax center to decrease staff workload and centralize calls in order to streamline workflow. Created a staff manual for training. Created a patient self check in system and enhanced patient online booking. Created demo videos for patients to teach them how to book online and self check in.

Outcomes Achieved

- Comprehensive staff training manual and training sessions regarding but not limited to PIPA, EMR, Workplace safety, workplace harassment and dealing with violence, and clinic practice standards. Now staff is able to refer to manual in order to troubleshoot and deal with issues.

- Established call and fax center.

- Reduced workload and phone disruptions to staff and doctors and streamlined workflow.

- Created eFax system that is incorporated into our EMR which saved time and resources by going paperless. Not only does it make the doctors' and staffs' jobs easier but it is also our steps towards being eco friendly.

- Simplified online booking and created patient self check in system, self online management and online registration. Patient can now take charge in their own booking and also reduced staff workload.

Standardizing Physician Approach & Patient Education on IUD Pain Management

Description

Pain relief for the insertion of IUDs is a very hot topic. We wanted to provide our patients with evidence based options and improve their experience of care and also improve the clinic workflow during this change. Costs are related to physician time doing the literature search, developing and implementing survey, developing the patient information tools, meeting with staff to review workflows.

Outcomes Achieved

It is still too early to assess any changes in outcomes. The providers in our clinic are encouraged to have a standard and evidenced based approach to this difficult issue. All physicians are already more encouraged to provide IUDs to younger (under 18) patients. We have yet to assess the practical efficacy of the topical lidocaine.

Updated Clinic Manuals & Procedural Guidelines

Description

1. Updated Manual for Emergency Drugs/Oxygen Tank Maintenance: This manual will provide clear, step-by-step instructions on how to properly inspect, store, and maintain Emergency Drugs and oxygen tanks to ensure safety and comply with industry standards.

2. Updated Step-by-Step Guide for Handling Medical Records: This guide will outline best practices for managing medical records, focusing on privacy, accuracy, and regulatory compliance.

3. Updated Manual for Autoclave Maintenance and Cleaning: This manual will give detailed instructions for cleaning, maintaining, and calibrating autoclave equipment to ensure proper sterilization and extend the equipment's lifespan.

4.Updated Procedures for Suture Packing: This update will improve the procedure for packing sutures to ensure sterility and prevent contamination.

5. Sample Containers/STD Drugs Checklist: This project will create a standardized inventory checklist to track medical and office supplies, helping to manage stock levels efficiently, reduce waste, and streamline ordering processes.

6.Updated Safety Sheets for Chemical Products: We will review and update all safety sheets for chemicals used in the facility, ensuring staff are informed of hazards and proper handling techniques.

7. MOA Duty Lists (Morning and Afternoon): This project will create organized duty lists for MOAs for both shifts, helping them prioritize tasks, improve efficiency, and reduce errors.

8. Inventory/Vaccine Checklist: This checklist will track medical and office supplies, ensuring items are available when needed, preventing overstocking or shortages, and improving the ordering process.

Outcomes Achieved

1. Updated Manual for Emergency Drugs/Oxygen Tank Maintenance: The goal was to create a clear and easy-to-follow manual to ensure proper handling and maintenance of emergency drugs and oxygen tanks. This has been achieved, and the manual is now being used by the team to maintain safety standards and ensure compliance.

2. Updated Step-by-Step Guide for Handling Medical Records: We successfully created a comprehensive guide for managing and securing medical records. This has helped staff handle sensitive information more securely, ensuring privacy and accuracy while also meeting regulatory requirements.

3. Updated Manual for Autoclave Maintenance and Cleaning: The updated manual for autoclave maintenance is now in place. This guide ensures the equipment is cleaned, maintained, and calibrated properly, helping to improve sterilization practices and extend the lifespan of the equipment.

4. Updated Procedures for Suture Packing: We have successfully updated the procedure for packing sutures. This change has helped ensure that sutures remain sterile and are packed in a way that prevents contamination, improving patient safety.

5. Sample Containers/STD Drugs Checklist: We introduced an inventory checklist to help monitor and track medical and office supplies more effectively. This checklist has streamlined the ordering process and helped the team ensure that we always have necessary items in stock without overstocking.

6. Updated Safety Sheets for Chemical Products: We reviewed and updated all safety sheets for the chemicals used in our facility. This has improved the staff's understanding of proper handling techniques and helped to avoid any safety hazards.

7. MOA Duty Lists (Morning and Afternoon): Clear duty lists for Medical Office Assistants were created, helping them prioritize tasks and manage their time better. This has made daily operations more efficient and reduced errors in task completion.

8. Inventory/Vaccine Checklist: The inventory checklist was successfully implemented, which has helped the team track and manage vaccine and medical supplies more effectively. This has ensured that necessary supplies are always available when needed. Unexpected Results: One unexpected result was that the updated procedures and checklists not only improved efficiency but also increased team communication. Staff were able to collaborate more effectively, which made the workflow smoother than anticipated. Additionally, some staff members reported feeling more confident in their roles due to the clearer guidelines provided.

Staff Training & Workflow Coordination Improvements

Description

I would like to express my gratitude for the grant provided to our clinic to enhance our workflow. After assessing our current processes, we identified several areas where we could improve efficiency and patient care. One key improvement was providing better orientation and training for our staff. This included clear instructions on patient check-in procedures and assigning specific responsibilities to each staff member to ensure a smooth workflow. By defining roles more effectively, we could enhance communication and reduce delays in patient care. We also refined our workflow structure to ensure that each staff member knows their specific duties and how to coordinate efficiently with others. This will streamline patient handling, minimize wait times, and improve overall service quality.

Outcomes Achieved

Through the implementation of the measures outlined in our application, we have successfully improved our clinic's workflow, resulting in higher-quality patient care. By enhancing staff orientation and clearly defining roles and responsibilities, we have streamlined patient check-in, and task delegation. This has led to improved coordination among staff, and more efficient patient experience.

Enhanced Vaccine & Emergency Kit Storage

Description

- Staff training, office setting re- organization, EMERGENCY updated, VACCINES, monitoring logs

- New settings, new fridge vaccines accommodations, equipment's

Outcomes Achieved

1. More vaccines updated and provided to children and elderly, the increased number ps patients in our practice.

2. More spaces for emergency kits and treatments.

3. Able to book more appointments, in person and virtual visits, for needed patients.

4. Able to accept new patients, especially newborn and family members of existing patients.

Development of Onboarding Checklist & Orientation Documents

Description

Our goal was to determine an orientation process for onboarding new staff, since after 7 years somehow this was never documented or determined! We have created a checklist with requirements for staff to obtain prior to working at the clinic (HR requirements) as well as created orientation documents outlining the physician's responsibilities, schedule and workflow. We also made a similar document for NPs.

Outcomes Achieved

Our clinic will be better prepared and organized to onboard new providers joining the clinic. The new providers will now have documentation to reference to learn workflow and how their schedule will be structured, as well as the expectations of their role in the clinic. This will clearly explain the role upfront, instead of having them need to learn on the job or only know from experience. When I started, I had a quick meeting with a physician to review the clinic processes but there was nothing to reference once I started the job. Now we can better communicate the role to new hires, and provide imperative information on the clinic environment in the workflow document. I am pleased with the preparedness which will dramatically increase when the next staff is onboarded.

Optimizing Registration & Patient Interaction with Ocean

Description

There are two projects supported by this clinic grant: Patient Registration Status Ocean Patient Engagement Tool.

Outcomes Achieved

Both initiatives are related. We first implemented the Ocean Patient Engagement Tool and then developed and trialed a protocol to update the registration status of patients who have not visited the clinic for three years or more. This process is much simpler than our traditional phone call method, where staff had to repeatedly call and leave messages. The new protocol has improved staff workflow efficiency and job satisfaction. Patient feedback has been positive, as answering questionnaires is secure and convenient, without the pressure of phone conversations. From the clinic's perspective, this approach allows us to free up space more efficiently for new patients. So, our two projects lead to positive feedback on staff workflow efficiency, staff experience, patient experiences, and better care access.

Clinic Sterilization Manual Updates

Description

Update/improve clinic sterilization manual/work protocol to ensure any new or old staffs assigned for equipment sterilization can properly perform required steps in ensuring clinic reusable tools are properly sterilized. Expected Goals and Outcomes: By updating and improving / clarify reusable clinical tools and equipment sterilization protocol/manual, I hope to achieve (a) easier to follow protocols (b) improved workflow/improved efficiency regarding sterilization process for staffs assigned to equipment sterilization, and (c) ensure all tools are properly sterilized, resulting in greater patient safety.

Outcomes Achieved

- protocol for sterilization is now simpler, easier to follow. Staffs now takes less than 10 minutes to finished all the sterilization steps

- work flow efficiency improved as protocol is easy to understand and follow, decreased time in doing the required steps and mistakes. Staffs now finds doing sterilization task easy.

- all medical instruments showed appropriate sterilization results. No infection reported with the use of sterilization equipment from patients.

Patient Record & User Account Optimization in EMR

Description

Researching new emr system myles, meetings and trial. Training 3 staff on completing profiles completely and correction, filling in all areas

- training, plus tracking and review, cleaning up database (merging profiles) one staff, ensuring emails and phone number are entered for each patient

- Building new forms, cleaning up database of forms, requestions and reports - (still on going - not complete) training on voice to text and creating tasks in patients to follow up on to improve continuity of care

- Manual and policy updates -(still a work in progress)

Outcomes Achieved

1. improvement on accuracy of collection information on patient files and having completed files

2. reduction in missed appointments due to implementation of automatic reminders

3. voice to text note to ensure the correct information is in clinic file in a timely manner and task set up for further follow up with the team

4. increasing client flow with reduced missed appointments with the automatic reminders and decrease staff responsibilities

Patient Engagement & Advanced Care Planning Awareness

Description

Identify the workflow necessary to try and get more awareness of Advanced Care Planning. Patients over the age of 80 were identified using EMR Information assembled for those patients and list for Nurse to be having them come in. Status tags for patients identified and then documentation that will be used for patient wishes.

Outcomes Achieved

1. Pt have been selected and the workbook is available to be sent via email or hardcopy.

2. EMR Tags created for ACP and Mostly"

3. New medical learner has accepted the role to continue the project.

4. New learner to work along our new RN to start to send and collect responses as well as to assign appointment times for the review of the documents and our MOST form discussions.

Clinic Workflow Optimizations for Security & Efficiency

Description

- We spent some group meetings with our MOAs to come up with an efficient way to run our clinic. We are using a new google sheet now that has different tabs organizing faxes of all medical clinic/hospitals/labs. In other tabs we have un-insured fees for forms/visits/procedures. Using a google sheet helps to organize everything and share all the information. We understand to not provide sensitive patient data there. But the workload between MOAs is much better now.

- We are using a software named 3CX that is locally installed as a PBX in our clinic. This software helps to safely communicate between doctors and MOAs and since it is installed locally the patient data would be secure.

- We updated and made some brochures for patient instructions for the services offered by our dermatologists.

- We updated our clinic policy folder.

- We updated our autoclave and sanitization procedure instructions.

Outcomes Achieved

Improved clinic workflow and efficiency. We reached almost all the goals we had for this project.

Optimizing Clinic Workflows by Improving Digital ADHD & Mental Health Assessments

Description

Enhancing ADHD & Mental Health Assessments with an Improved System

Outcomes Achieved

Outcome 1: Enhanced Patient Care

The implementation of a customized digital assessment system has significantly improved efficiency, accuracy, and accessibility in ADHD and mental health evaluations. This system has also minimized administrative burdens, reduced patient frustration, and improved continuity of care by generating structured reports that can be shared with other healthcare providers.

Key Outcomes Achieved:

- Faster, more efficient assessments with fewer errors

- More accurate diagnoses through structured, validated data collection

- Reduced patient and provider frustration - Seamless continuity of care through comprehensive reports.

Outcome 2: Improved Clinic Operations & Workflow.

The implementation of the digital assessment system has streamlined clinic operations by reducing administrative workload, minimizing errors, and improving workflow efficiency.

Key Outcomes Achieved:

- Reduced administrative workload and manual data entry

- Faster turnaround for assessments and treatment planning

- Fewer errors and missing forms, leading to improved efficiency

- Better use of clinic resources, allowing more time for patient care.

Outcome 3: Improved Patient Access.

The implementation of the digital assessment system has significantly improved patient access to timely and structured ADHD and mental health evaluations.

Key Outcomes Achieved:

- Reduced barriers to completing assessments (no printing, scanning, or mailing required).

- Shorter wait times for patients due to improved workflow efficiency.

- More streamlined coordination with family members, teachers, and other informants.

- Faster access to diagnosis and treatment, improving patient outcomes.

Outcome 4: Improved Physician & Staff Experience and Wellness.

The transition to a digital assessment system has significantly reduced the administrative burden on both physicians and staff, leading to improved efficiency, reduced stress, and better overall workplace wellness.

Key Outcomes Achieved:

- Reduced physician burnout by minimizing time spent on administrative work.

- Improved staff efficiency and job satisfaction with fewer manual tasks.

- More time available for patient interaction and clinical decision-making.

- A more organized, structured, and stress-free workflow.

Office Manual Development

Description

Create office manual to enhance team based care

Outcomes Achieved

We have improved clinic operations and workflow and improved physician and staff experience.

Clinic Procedures Manual Development

Description

Developing a secure online clinic procedures manual

Outcomes Achieved

Greater ease of accessing critical information and guidance when needed.

Clinic Sterilization Manual Update

Description

Update autoclave and surgical instrument sterilization office manual/policies for workflow to meet new College standards.

Outcomes Achieved

Improved facilitation of training of new staff on the complex autoclave and surgical instrument sterilization requirements

Appointment Scheduling Manual Update

Description

Updating appointment scheduling manual.

Outcomes Achieved

Improved clarity of appointment scheduling manual, MOAs scheduling more appropriately, less questions for physician on booking appointments.

Clinic Policy & Procedure Development

Description

Our project involves creating clinic policies and procedures. It also provided some patient education material.

Outcomes Achieved

Having created our clinic policies and procedures, we noticed improved efficiency of our operations. It allowed our staff to streamline the clinic procedures with faster efficiency. It also allows new staff to learn our policies easily. This will improve patient care.

Employment Contract Development & Role Definition Clarifications

Description

We used our grant money to create employment contracts for our physicians and MOAs to clarify roles and responsibilities within the clinic.

Outcomes Achieved

We used our grant money to create employment contracts for our physicians and MOAs to clarify roles and responsibilities within the clinic. These contracts are beneficial in reducing any confusion about roles and expectations and will result in increased efficiency in workflows. As a result, our MOAs feel clarity in their roles and responsibilities within the clinic and can come to work each day knowing what is

expected of them. Our physicians now have written contracts with details of their contractor agreements.

Office Manual Update

Description

We have a large office manual (190 pages) that hadn't been updated in many years. Our manual includes sections on office policies, privacy and security, emergency procedure, occupational health and safety, clinic facility, administration, staff policies, office procedures, telephone, fax and IT, patient enquiries, booking appointments, referrals, and EMR use. We reviewed and updated all sections of the manual. This involved meeting with team (doctors, MOAs) to review many of our office policies and procedures. We also reviewed many available online resources including information & guidelines from BC College of Physicians and Surgeons, Doctors of BC, DTO, Pathways, BCCDC, BCCA, Ministry of Health, and WorkSafe BC. Then the contents of the manual were updated and reviewed by the MOA team.

Outcomes Achieved

Staff now have an up-to-date resource that outlines all office procedures and protocols that they can refer to, the manual will assist in on-boarding and training new staff, we anticipate that now workflow will be more efficient now that office procedures are clarified, in writing in an accessible manner. The manual also clearly outlines each staff members' duties and will be useful for staff evaluation.

Clinic Policy Development & Documentation

Description

We worked as a team to come up with clinic policies, researched what was being done in similar settings and then wrote and edited our own.

Outcomes Achieved

Some policies completed as attached. We now all have access to these resources and can edit them as needed. We share them with new staff during onboarding and plan to refer back to them regularly.

MOA Training Manual & Office Policy Development / Update

Description

This grant project will significantly improve patient care and safety, enhance staff performance, and increase patient satisfaction at Clinic. By updating policies, providing clear patient education, and ensuring regulatory compliance, the clinic will create a more effective and patient-centered healthcare environment. Ultimately, this project aims to foster better patient outcomes, improve operational efficiency, and ensure that patients are empowered to take an active role in their healthcare journey.

Outcomes Achieved

Our achieved target outcomes include:
 1) successfully creating and updating the Medical Office Assistant (MOA) training manual to enhance the education of our MOAs, ensuring they have a comprehensive resource to reference for any questions.
2) We also revised our clinic policy to offer clear, easily understandable guidelines for patients, making them fully aware of our expectations and procedures.
3) Additionally, we developed a poster explaining why doctors may run late, aiming to improve patient understanding and communication.

Optimizing Staff Development & Operational Efficiency Through Creation of Manuals, Policies, and Training Documents

Description

(a)This project aims to develop a comprehensive suite of manuals, policies, and training documents to enhance both onboarding and ongoing training for medical office assistants (MOAs) and healthcare providers. These materials will equip new hires with the knowledge they need to integrate seamlessly into the clinic while also supporting continuous professional development for existing staff.

For MOAs, the materials will detail day-to-day operational tasks, troubleshooting common issues, effective use of the electronic medical records (EMR) system, data migration protocols, and guidelines for supporting healthcare providers.

Additionally, they will include procedures for managing billing processes and other essential administrative functions.

For healthcare providers, the documents will address clinic-specific policies and procedures, including emergency response algorithms, billing and compensation guidelines, and an overview of benefits. These resources will also provide clear guidance on adapting to the clinic's workflows and expectations.

By hosting all materials on the organization's employee portal, staff will have continuous access to these resources for training and reference purposes. The development of these materials will involve a collaborative effort between IT professionals, executives, management, and administrative staff, ensuring the content is accurate, practical, and aligned with the organization's operational goals.

(b) The Vancouver clinic manager and senior MOA were involved in this project, additionally, the Chief Operating Officer (COO) reviewed the project.

Outcomes Achieved

Target Outcomes Achieved:

1. Onboarding and Training Materials: We successfully created detailed manuals and documents for MOAs and healthcare providers, covering daily tasks, EMR system use, troubleshooting, billing, and clinic-specific policies. These materials have helped new hires get up to speed quickly and support ongoing training for existing staff.

2. Support for MOAs: The materials provided MOAs with clear guidance on managing daily tasks and interacting with healthcare providers. This has made their onboarding process easier and more efficient.

3. Support for Healthcare Providers: The resources created for healthcare providers helped clarify clinic policies, emergency response steps, and billing processes, improving their understanding of workflows and expectations.

4. Employee Portal Access: We centralized all training materials on the employee portal, giving staff easy access to resources whenever needed. This has made it more convenient for everyone to reference important information.

5. Collaborative Effort: The development process involved collaboration between IT, management, and administrative staff, ensuring the materials were accurate and practical, which contributed to better clinic operations.

Unexpected [Outcomes]

1. Improved Efficiency: The new materials improved communication and efficiency between MOAs, healthcare providers, and management, leading to smoother operations and faster issue resolution.

2. Better Staff Retention: The clearer guidelines and better support during onboarding contributed to increased job satisfaction and helped reduce turnover.

3. Increased Use of the Employee Portal: Staff have started using the portal more than expected, not just for training materials but also for updates on clinic news and policies.

Enhancing Operational Efficiency & Staff Training through Clinic Policy Development (1)

Description

The grant project focused on developing and implementing essential clinic policies, procedures, and training materials to enhance workflow efficiency, ensure consistency in operations, and improve patient care. The primary deliverables of this project included:

- Medical Office Assistant (MOA) Manual

- Patient Support Plan

- Onboarding Training Manual

- Reprocessing Manual

These materials were designed to ensure smooth clinic operations, improve staff efficiency, and enhance patient experiences by reducing inconsistencies in service delivery.

Outcomes Achieved

Target Outcomes Achieved:

1. Standardization of Clinic Procedures:

-The creation of the MOA Manual ensured that daily operations were structured and organized.

- Staff members now have a clear reference guide for clinic workflows, reducing inconsistencies in service delivery.

2. Streamlined Onboarding Process:

- Training times have been reduced, allowing new hires to become operational more quickly.

- The Onboarding Training Manual has simplified the hiring and training process, ensuring new employees are well-acquainted with clinic policies and expectations.

3. Enhanced Patient Management and Support:

- The Patient Support Plan has provided a structured approach to handling patient concerns and complaints.

- Improved processes for managing missed appointments and cancellations have resulted in better scheduling efficiency.

4. Improved Compliance and Safety in Reprocessing Procedures

- The Reprocessing Manual has established clear protocols for sterilization, reducing the risk of procedural errors and ensuring compliance with health regulations.

- Staff are now better equipped to handle reprocessing duties safely and effectively. Unexpected Results:

- The standardization of workflows led to a noticeable improvement in staff morale, as employees reported feeling more confident and informed about their roles.

- Patient satisfaction scores have improved due to the structured approach to handling complaints and appointment issues.

- Time spent on administrative training has decreased, freeing up more time for patient care.

By implementing these new policies and procedures, the clinic has significantly improved operational efficiency, staff preparedness, and patient care experiences.The support provided through the grant has been instrumental in achieving these outcomes.

Operational Documentation Development

Description

Policy Manual and Workflow Guides: - Create a comprehensive "digital manual" to ensure all clinics operate efficiently and consistently.

- Include patient-facing process templates for key workflows (e.g., recall systems, patient contact follow-ups).

- Patient Engagement Resources:

- Develop and translate materials to improve communication and accessibility.

- Create short, engaging scripts for MOAs to enhance patient experience during visits. Standardization and Training:

- Use data and lessons from successful past projects (e.g., workflow overviews) to train clinic staff.

- Enhance onboarding resources and workflow guides.

Outcomes Achieved

Over the course of the project, we successfully achieved our expected outcomes by developing a comprehensive digital manual and standardized workflow protocols that significantly enhanced clinic efficiency and consistency. Our new patient-facing materials and tailored training modules improved staff onboarding, reduced operational discrepancies, and elevated the overall patient experience. Additionally, by incorporating industry best practices, we discovered unexpected benefits such as enhanced interdepartmental collaboration, increased staff morale, and improved regulatory compliance. These gains have not only led to immediate improvements in service delivery but have also laid the foundation for long-term cost savings and scalable operational excellence across all clinics.

Enhancing Operational Efficiency & Staff Training through Clinic Policy Development (2)

Description

Comprehensive Clinic Manual and Workflow Development Initiative: this project aims to develop a comprehensive suite of standardized policies, procedures, and patient-facing materials tailored to the unique needs of clinic. The focus is on enhancing clinic workflows and operational consistency while improving patient engagement and staff onboarding processes.

Key Features:

Policy and Procedure Manual Development:

- Creation of a digital library (central SharePoint) of detailed and standardized policies and procedures covering core workflows and operational policies (e.g., patient recalls, consent, and storage guidelines).

- Integration of existing successful policies (e.g., Behavior Policy, Allergy Injection Consent Policy) into a cohesive framework.

Patient-Facing Material Enhancements:

- Development of patient-friendly educational resources.

- Translation of key materials into multiple languages to serve diverse patient populations.

Workflow Standardization:

- Leveraging the collective insights from our Vancouver clinics to standardize clinic processes across all clinics.

- Training modules for MOAs and other staff, including onboarding, patient service standards, and digital tool usage.

Outcomes Achieved

Over the course of the project, we successfully achieved our expected outcomes by developing a comprehensive digital manual and standardized workflow protocols that significantly enhanced clinic efficiency and consistency. Our new patient-facing materials and tailored training modules improved staff onboarding, reduced operational discrepancies, and elevated the overall patient experience. Additionally, by incorporating industry best practices, we discovered unexpected benefits such as enhanced interdepartmental collaboration, increased staff morale, and improved regulatory compliance. These gains have not only led to immediate improvements in service delivery but have also laid the foundation for long-term cost savings and scalable operational excellence across all clinics.

Standard Operating Practice Binder Development

Description

Our project aimed to develop a comprehensive clinic SOP binder, or "clinic bible," designed as a go-to reference for MOA and administrative staff.

This binder serves as a centralized resource, containing everything necessary for both current and new MOAs to ensure consistency in training and daily operations.

 The primary objectives of this initiative are to streamline clinical workflows, minimize errors, enhance patient safety, reduce operational costs, and improve both patient and physician experiences. Given the scope of this project, we strategically divided it into

phases to ensure thorough implementation. Phase 1 is now complete, establishing the foundational structure of the binder, including a well-organized table of contents. It also encompasses essential guidelines, such as MOA roles and responsibilities, standardized tray preparation procedures for IUDs, PAPs, and biopsies, as well as general physician guidelines. This marks a significant milestone in our ongoing commitment to improving efficiency, safety, and overall clinic operations.

Outcomes Achieved

The implementation of this project has led to a significant enhancement in MOA knowledge and a notable increase in physician satisfaction. More importantly, clinical workflow has been transformed with a more streamlined and efficient approach to preparing PAP, IUD, and biopsy trays. Previously, inconsistencies in tray preparation resulted in frequent errors, with essential items—such as the PAP light—being misplaced or missing entirely. These oversights not only disrupted procedures but also incurred unnecessary costs for the clinic. By introducing a simple, clear, and visually guided protocol, MOAs and RNs now have a reliable reference to ensure every tray is consistently and correctly prepared. The impact has been overwhelmingly positive. Physicians have reported a significant reduction in errors, leading to a more efficient, organized workflow that enhances both patient care and provider experience. With greater confidence in the system, they are now more comfortable booking these procedures, knowing that all necessary tools will be readily available. Phase one of this initiative has been a resounding success, and we remain committed to refining and expanding this clinical "bible" as part of our ongoing efforts to improve workflow efficiency, enhance patient safety, and elevate provider satisfaction.

Enhancing Operational Efficiency & Staff Training through Clinic Policy Development (3)

Description

This grant project focuses on developing and implementing a comprehensive Medical Office Manual to enhance clinic efficiency, streamline workflows, and improve patient care. The manual serves as a detailed guide for Medical Office Assistants (MOAs) and Medical Directors, ensuring clarity in roles, responsibilities, and best practices in medical office management.

Objectives of the Project:

-Improve workflow efficiency by standardizing office procedures.

-Reduce administrative and clinical errors by providing clear guidelines.

 -Enhance patient experience by optimizing appointment scheduling and flow.

 -Ensure regulatory compliance with medical and administrative policies.

 -Provide structured training resources for new and existing staff.

-Implement best practices in managing paper and electronic medical records (EMR).

Outcomes Achieved

Expected Outcomes & Impact:

-Reduction in patient wait times and administrative inefficiencies. -Increased staff productivity and job satisfaction.

-Improved patient satisfaction due to a more structured and efficient medical office.

-Reduction in documentation errors and enhanced compliance with healthcare regulations.

-Standardized training resources that facilitate onboarding and continuous learning.

Clinic Handbook Development

Description

We created a new clinic handbook with procedures and clinic policies. Task prioritization, procedures for follow up with incomplete tasks, referral, recurrent no-show patients, form/document requests, legal requests, material restocking, sample cabinet upkeep, etc.

Outcomes Achieved

We created a manual that helped improve clinic workflow and staff training. It improves patient safety. It has significantly improved our office policies and procedures. We are able to take on more patients due to better organization.

Updates to Clinic Manual & Email and EMR Templates

Description

New message templates for patients in the EMR and clinic email:

- document to patient

- appointment notice to patient

- BCMA fee guide with clinic payment options

- Lab req to patient with and without fasting

- Radiology req to patient with nearby clinics and exam preparations e.g. full bladder

Preventative screening messages to patients:

 - FIT, Breast Screening, Cervical Screening, BMD, lung screening

- review BCCA website and include booking information for patients and FAQ.

Email templates:

-Auto-reply update

- including methods of how to schedule appointments with the clinic

 - inform patients to include patient full name, date of birth, appointment type preference (telephone or in-person) and availability

-Template replies which include provider schedule hours.

Questionnaires and encounter templates:

-create questionnaires and custom encounter templates into data points for the 20 most common medical reasons

- detailed intake questionnaire and encounter template

- efficient charting and pre-review of patient history and presenting medical reason. -create notes and questions for medical reasons

-create the questionnaires and custom data points for the encounter templates in the EMR

Revised MOA protocol and training manual:

- privacy and confidentiality
- respectful interaction
- vacation, time off requests, shift reporting
- appointment booking protocol for each provider
- phone lines, rooming, EMR, inboxes, faxes, referrals, recalls, record requests, urgent tasks, review of all clinic workflow items and policies.

Physician workflow manual:

-Scheduling, set-up with provider resources e.g. CareConnect, Pathways, etc., quick messages, EMR workflow review and abbreviations used internally in the EMR for efficient documentation and time saving.

New appointment types:

- RN appointment type
- Recall appointment type.

Clinic Signage:

- preventative screening information sheets
- vaccinations information sheets
- BCMA fee guide.

Outcomes Achieved

The phone line recording has helped staff respond to inquiries more efficiently as we know what the inquiry is prior and return the call or reply electronically with the appropriate information. This has improved the number of inquiries we can get to and resolve some of the workload associated with our busy phone lines. The intake questionnaires help us ensure we fully review the patient medical history and help ensure preventative screening has been reviewed with the patient.

Strengthening Emergency Preparedness & Clinic Operations

Description

With the grant, we have designed a strategic plan to improve clinic outcomes through targeted initiatives, including the creation of essential policies, staff training, and process enhancements. This statement outlines our intended projects, their purpose, and the expected impact on clinic operations.

1. Creation of Clinic Manuals, Policies, and Documents The establishment of comprehensive clinic manuals, policies, and operational documents serves as the foundation for a well-regulated healthcare environment. These materials will provide clear guidelines for staff and physicians, ensuring consistency in clinical procedures, administrative workflows, and patient interactions. Although there is no direct cost for physicians, staff overtime expenses have been allocated to facilitate research, writing, and review processes. This initiative aims to enhance organizational structure, support compliance with medical regulations, and improve overall efficiency.

2. First Aid and Emergency Response Training Providing first aid and emergency response training is essential in a healthcare setting, where quick and informed action can save lives. This project will allocate funding to ensure that all clinical personnel are well-equipped to handle emergency situations. Additional administrative time will be dedicated to organizing and scheduling these training sessions. By strengthening our emergency preparedness, we aim to promote patient safety, foster confidence in crisis management, and align with best practices in medical response.

3. Vaccine and Immunization Safety Policy Development Vaccination protocols play a crucial role in public health and patient safety. The development of a vaccine and immunization safety policy will formalize our clinic's approach to administering vaccinations, ensuring adherence to best practices and safety guidelines. Staff overtime costs have been designated to support policy creation and training efforts. This initiative will help mitigate risks, enhance vaccine administration procedures, and improve patient education regarding immunization safety.

4. Implementation of a Triage System The implementation of a structured triage system will streamline patient care by prioritizing cases based on urgency and medical necessity. This initiative primarily allocated to administrative time for system design and staff training. Overtime compensation for four staff members is included to ensure a smooth transition into the new system. A well-functioning triage framework will optimize workflow efficiency, reduce patient wait times, and improve overall clinic responsiveness to urgent medical needs.

Outcomes Achieved

Each of these initiatives contributes to a broader vision of strengthening our clinic's operational effectiveness, enhancing patient safety, and improving the overall healthcare experience. By utilizing the grant funding in a targeted manner, we can ensure measurable improvements in clinic policies, staff competency, and patient care quality. Through collaborative efforts and dedicated implementation, these projects will foster a more efficient and responsive medical practice that aligns with best standards in healthcare delivery.

Clinic Manual Update and Workflow Tool Integration

Description

My team and I dedicated extensive hours for the completion of this project putting together the office manual, inventory, supply managerial set-up, staffing and scheduling,

professional use of email templates for a better professional correspondence and use training for the use of miraxis tool to in-put all the details into the system for a better workflow overall for the clinic. Our team worked diligently on various aspects, including training, implementation, and efficiency.

Outcomes Achieved

The outcomes of our project, which has significantly improved our office operations, staff management, and overall efficiency. Thanks to the grant utilization, we have successfully implemented a structured system that has led to the following key improvements:

Project Outcomes:

1. Office Manual Implementation – We now have a comprehensive office manual that standardizes procedures. example: If someone is on leave, we can now base or answers queries for procedures and policies.

2. Enhanced Office Management System – A better system for managing staff, patients, and supplies has been established, improving organization and reducing inefficiencies. example: Staff can now see their schedules online, a better way of communications with staff, physicians and inventory is well organized. A vaccine or any medical, office supplies or STI meds, samples etc. can now be track automatically and can print report of usage and alerts for expiry dates. Order management of supplies gives us alert on pretty much everything on our supply if it is getting low.

3. Streamlined Workflow – The overall workflow has become more structured and efficient, allowing for smoother day-to-day operations. example: working on email templates has increased efficiency and professionalism has improved.

 4. Increased Efficiency – With the implementation of a well-organized system, we have optimized processes, reduced administrative burdens, and improved service delivery. example: Staff are less stress now with the workflow and good team work has improved. This project has had a significant impact on the way we manage our clinic, ensuring sustainability and improved operational effectiveness.

Website Update & MOA Training Manual Creation

Description

I rebuilt clinic website and created cross-training MOA's manuals.

Outcomes Achieved

The target outcome is to better educate patient on available services in our community. Educate staff on creating better workflow.

Workflow & Workspace Optimization

Description

Grant used to work with the office staff and physician to modify the workflow, work space and the use of EMR to collaborate and to fit different ways the doctors practice to enhance patient access and improve patient care.

Outcomes Achieved

Having worked in a multi-doctor clinic, I am pleased to bring the efficiency and collaborative dynamics of a group practice to a solo family practice. The clinic is looking forward to a new part-time locum joining us. Having more family physicians in the clinic will certainly enhance team based care, improve patient access and experience. We will continue to improve clinic operations and workflow which hopefully will lead to improve staff and physician experience.

Creation of and Updates to Clinic Operational Documents

Description

-Updating Manuals for policies and procedures with every new physician member, moa team, RN, volunteer med students and volunteer clinical admin staff.

-Create a manual for On-boarding new doctors EMR registration and scheduling, Teleplan form processing and LFP registration submission.

-Update contracts for physicians.

-Updating EMR new users for staff and other admin members like med students and volunteers.

-Updating Sterilization manual and training new staff for autoclave usage.

-Updating inventory manuals for clinical and office supplies, vaccines and STI meds.

-Updating and managing after-hours on-call physician lists and procedure manual on how to change the physician on call on a bi-weekly basis and sending notification to the physician on call.

-Create a manual on handling policies and procedures for holiday and locum coverage for physicians and staff coverage for sick days or vacation.

-Create a manual folder for creating templates for email correspondence for a faster work flow on scheduling appointments.

Outcomes Achieved

An improved and organized standard materials and tools are kept electronically for a better collaboration and easy access when needed. A good collaboration with any team member in the clinical practice. An easy workflow for compiling different auto templates for a better with email correspondence professionally. Inventory for all meds, vaccines, samples and supplies are well monitored and can be easily ordered through the inventory management tool. Contracts and Forms are also electronically filed.

Vaccine Storage Improvement

Description

Buy a Vaccine Fridge with a glass door (reduces the need to open the door to regularly monitor the vaccine supply/expiry date etc.)

Outcomes Achieved

Bought a Vaccine Fridge with a glass door (reduces the need to open the door to regularly monitor the vaccine supply/expiry date etc.); automated temperature control is also an advantage.

Referral Form Digitization

Description

Digitizing referral forms and requisitions

Outcomes Achieved

More efficient MRP and MOA use of time. We saved on the time MOA spends on notifying MRP of the incorrect/outdated form, and the MRP rectifying the referral form. This also resulted in improved staff morale and improved quality of service

Patient Record Digitization (1)

Description

We continue to prep, scan and upload and attach old paper charts into our EMR system. It's a time consuming project that is costly and land intensive. Some of the files from the 1970's and 1980's had to be photocopied first and then scanned.

Outcomes Achieved

We managed this convert some more of our archived paper charts into a digital format to improve access to information.

Patient Record Digitization (2)

Description

Made all paper files dating back 42 years to electronic discs to be able to transfer patients file to electronic medical records thru medrecords; organizing all files by 3 receptionists (brought in a 3rd receptionist) specifically to address this by organizing all files in chronological order over 42 years of files which involved a lot of time; charts sent to medrecords for digitalizing and getting rid of all paper files.

Outcomes Achieved

Paper records are now digitalized and paper files will no longer be used going forward for better environmental footprint; patients and staff pleased with better organization and patients reassured about continuity of their medical files.

Patient Record Digitization (3)

Description

Have about 29 boxes of charts that needed to be digitized and shredded. MOA and Doctors have agreed that MOA will scan all charts, store digitized files in password protected external HDD and arrange for shredding.

Outcomes Achieved

We have scanned all 29 Bankers boxes of paper charts, digitized and stored files in a password protected external Hard Drives (2) and have arranged scanned paper charts for shredding. It did free us lots of space and eliminate fire and security concerns.

Patient Record Digitization (4)

Description

Digitalize files

Outcomes Achieved

Digitalize all files and dispose of all paper records Upgrade of computer system.

Patient Record Digitization (5)

Description

Digitalize paper files and charts

Outcomes Achieved

Old charts now in patient EMR so information is unified and accessible from anywhere. Will be easier to share information with other colleagues.

Patient Record Digitization (6)

Description

Digitizing paper charts into our EMR system.

Outcomes Achieved

Target is no paper chart remaining. Some still remaining, but much smaller number of paper charts. Will need to continue to work to scan the files into the EMR.

Patient Record Digitization (7)

Description

Digitalization of paper charts.

Outcomes Achieved

We were successful in digitalizing a large amount of our paper charts. We were aware that the grant would likely not cover the entire digitalization of paper charts but we were successful with the goal that we set.

Patient Record Digitization (8)

Description

Digitizing patients' paper charts.

Outcomes Achieved

We have done 400 patients.

Patient Record Digitization (9)

Description

Scan paper chart records into EMR, so I can easily access them from EMR.

Outcomes Achieved

My panel is over 3000 patients. I converted some charts in the last project, and some more in this project.