UGM 26 • PRE-CONFERENCE RESOURCE

Where Is Your Staff Still Doing Work the System Should Be Doing?

A practical NextGen workflow scorecard for referral, fax, document and task-heavy processes.

COUNT TOUCHES | FIND BOTTLENECKS | AUTOMATE EXCEPTIONS

HOW TO USE THIS

Spend 5–10 minutes with 1–2 teammates. Don’t overthink the answers. Mark “Unsure” when ownership or data is unclear. Use the results to decide what questions you want answered in San Diego.

Prepared by Shared IT

How manual are the recurring workflows?

Score each one based on what staff actually do—not what the documented process says.

Inbound referrals	☐ Automated	☐ Partial	☐ Mostly manual	☐ Manual
Fax routing	☐ Automated	☐ Partial	☐ Mostly manual	☐ Manual
Document indexing	☐ Automated	☐ Partial	☐ Mostly manual	☐ Manual
Patient matching	☐ Automated	☐ Partial	☐ Mostly manual	☐ Manual
Prior authorization	☐ Automated	☐ Partial	☐ Mostly manual	☐ Manual
Appointment scheduling	☐ Automated	☐ Partial	☐ Mostly manual	☐ Manual
Task creation	☐ Automated	☐ Partial	☐ Mostly manual	☐ Manual
Chart filing	☐ Automated	☐ Partial	☐ Mostly manual	☐ Manual
Patient outreach	☐ Automated	☐ Partial	☐ Mostly manual	☐ Manual
Records requests	☐ Automated	☐ Partial	☐ Mostly manual	☐ Manual

Pick one high-volume workflow and follow it end to end.

Every handoff is labor, delay and another opportunity for error.

1. Arrives
Owner: _____ Min: ___

2. Opened
Owner: _____ Min: ___

3. Reviewed
Owner: _____ Min: ___

4. Patient identified
Owner: _____ Min: ___

5. Categorized
Owner: _____ Min: ___

6. Routed
Owner: _____ Min: ___

7. Entered / filed in NextGen
Owner: _____ Min: ___

8. Task created
Owner: _____ Min: ___

9. Patient contacted
Owner: _____ Min: ___

Total touches

How many human touches occur before the workflow is complete? _____

Total minutes

How many staff minutes are consumed per item? _____

Identify the exceptions that create rework

Automation should handle the routine path and make the exceptions obvious.

- ☐ Missed / lost fax
- ☐ Wrong patient
- ☐ Wrong department
- ☐ Duplicate entry
- ☐ Delayed referral
- ☐ Manual rekeying
- ☐ No status visibility
- ☐ No clear owner
- ☐ Rework / callbacks
- ☐ Queue backlog

Most expensive failure

Which failure creates the most labor, delay, patient frustration or revenue risk?

Most common exception

Which situation actually requires human judgment—and which ones do not?

Translate workflow pain into operating cost

Use rough numbers. Precision comes later.

Items / referrals / faxes per day _____

Average staff minutes per item _____

Number of staff touching the process _____

Approx. loaded hourly labor cost _____

Estimated rework / exception % _____

ROUGH ANNUAL LABOR MODEL

Daily items × minutes ÷ 60 × loaded hourly cost × working days

Should this workflow stay manual?

A good automation target is high-volume, rules-based and exception-friendly.

☐ Input arrives digitally or can be digitized	☐ Yes ☐ No ☐ Unsure
☐ Required fields can be extracted reliably	☐ Yes ☐ No ☐ Unsure
☐ Patient can be matched using available data	☐ Yes ☐ No ☐ Unsure
☐ Destination action in NextGen is defined	☐ Yes ☐ No ☐ Unsure
☐ Routine cases follow consistent rules	☐ Yes ☐ No ☐ Unsure
☐ Exceptions can be routed for review	☐ Yes ☐ No ☐ Unsure
☐ Audit trail / confidence can be captured	☐ Yes ☐ No ☐ Unsure

UGM offer: complimentary Fax & Referral Workflow Assessment — map the current state, quantify touches and identify the best automation candidate.