YOUR LOGO
HERE

[Company Name]

Medical Office Flowsheet Processes Documentation

Prepared by: [Name]

Version control:

Version	Date	Author	Change description

Table of Contents

1 Medical office work process information

1.1 Issue management process
[Describe how flowsheet process issues are managed. Categorize issues on severity and impact.]

Item #	Description	Assigned to	Start date	Due date	Severity (H/M/L)	Progress (R/Y/G)	Status

1.2 Patient schedule management process
[Describe how the medical office manages scheduled patient appointments. Describe the procedure used to schedule appointments, as well as the tool used to store appointment information.]

1.3 Patient visit and examination process
[List the tasks that need to be performed during a patient's visit to the medical office. Use a copy of the first table below for each type of visit. In the second table, identify each staff member's role and responsibility for each task throughout a patient's visit.]

[Enter type of visit]			
Task #	Procedure	Resource	Duration (hours)
1			0.25
2			0.25
3			0.5
4			0.25
Total			1.25

Roles / Responsibilities	Perform patient check-in	Capture patient vital statistics	Perform patient examination	Diagnose patient's condition	Record patient examination results	Define report requirements	Create patient examination reports	Perform patient check-out	Store patient data
Administrator									
Medical assistant									
Nurse									
Physician									
Resources									
Computer									
Exam room									
Vital assessment room									
Exam equipment									
Flowsheet									

1.4 Patient follow-up process

[Describe the process in which the medical office provides feedback to its patients upon the completion of their scheduled visits. Include a summary of the flowsheet information acquired during each patient's initial visit.]

1.5 Patient referral and escalation process

[Identify the process used to refer patients to other medical offices that specialize in meeting specific healthcare needs.]

2 Patient data requirements

2.1 Patient data acquisition

[Identify the tools and methods used to acquire patient data during an examination. Examine each area of the existing flowsheet, and describe who gathers the data, when in the work process they acquire the data, and what data they capture.]

2.2 Patient data reporting

[Describe how the acquired data is analyzed and what the reporting requirements are. Criteria for reporting is based on the individual patient examination requirements.]

Message (action taken)	Delivery method	Sender	Receiver	Deliverable	Frequency
[Notify staff of patient arrival]	[Verbal]	[Administrator]	[All]	[Verbal notification]	[Once]
[Communicate patient vital statistics]	[Written]	[Nurse]	[Physician]	[Flowsheet]	[Once]
[Communicate patient exam data]	[Written]	[Physician]	[Medical asst.]	[Flowsheet]	[Once]
[Communicate exam data report requirements]	[Verbal]	[Physician]	[Medical asst.]	[Verbal notification]	[Once]
[Report patient exam data]	[Written]	[Medical asst.]	[Physician]	[Report]	[Once]
[Store patient exam data]	[Written & electronic]	[Medical asst.]	[Administrator]	[Flowsheet & electronic file]	[Upon exam completion]

2.3 Patient data storage and retrieval

[Describe the data storage system and the process in which the staff store and retrieve data. Identify the file-naming convention and the pathway to where the files are located.]

2.4 Patient data security

[Describe the medical office's security policy regarding patient data. Describe how the medical office secures "protected health information" (as defined by HIPAA).]

3 Lessons learned

[Identify ways that work processes could be improved. Solicit input from staff members in each department.]

ID #	Description	Submitted by	Action and result