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[Organization]

Nursing Scheduling Assessment

Prepared by:

Version Control

Version	Date	Author	Change description

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1 Nursing Management Analysis

1.1 Nursing Role Delineation

[Identify the responsibilities of each staff member.]

Roles / Responsibilities	[Perform patient check-in (validate insurance info; attain patient info)]	[Capture patient vital statistics (Height, weight, blood pressure, etc.)]	[Perform patient examination (determine patient's condition)]	[Diagnose patient's condition (evaluate patient's condition)]	[Record patient examination results (log patient info on flowsheet)]	[Define report requirements (determine what reports are needed)]	[Create patient examination reports (graph patient data; trend reporting)]	[Perform patient check-out (receive payment; assign follow-up appt.)]	[Store patient data (file, secure, back up patient data)]
[Administrator]	●							●	●
[Medical Assistant]					●		●		
[Nurse]		●					●		
[Physician]			●	●	●	●			
Resources									
[Computer]	●				●		●	●	●
[Exam Room]			●	●					
[Vital Assessment Room]		●					●		
[Exam Equipment]		●	●	●	●				
[Flowsheet]	●	●	●	●	●			●	●

1.1.1 Nurse Contact Information

[Identify nurse contact information (such as name, specialty, and e-mail).]

Name	E-mail	Phone	Specialty	Clinical team

1.2 Communication Plan

[Identify how patient data reports are communicated to pertinent staff members. Also, identify the frequency with which patient data should be received.]

Date (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 examination data]	[Written]	[Physician]	[Medical Asst.]	[Flowsheet]	[Once]
[Communicate examination data report requirements]	[Verbal]	[Physician]	[Medical Asst.]	[Verbal Notification]	[Once]
[Report patient examination data]	[Written]	[Medical Asst.]	[Physician]	[Report]	[Once]
[Store patient examination data]	[Written/ Electronic]	[Medical Asst.]	[Administrator]	[Flowsheet/Electronic File]	[Upon exam completion]

1.3 Nursing Management Processes

1.3.1 Schedule management

[Identify timing considerations for scheduling nursing assignments. Include policies and processes that your organization uses to determine availability, skill-level compatibility, and other aspects that affect scheduling of nursing resources.]

Nursing scheduling
spreadsheet

1.3.1.1 Employee Availability Restrictions

[Identify each item that affects scheduling of nursing resources.]

- Vacation/PTO request & approval process:

- Sick employee backfill process:

- Office holidays:

- Individual employee "regular" schedules:

- Schedule posting:

- Standard patient scheduling process and clinical workflow:

- Timekeeping:

- Clinic days/times:

- On-call service requirements:

- Office holidays:

- Required nurse training:

- Required nurse and/or staff meetings:

1.3.2 Resource management

[Identify the resources required by nursing staff members to perform their daily activities. Resources may include items such as equipment, rooms, and forms.]

Task #	Task name	Resource name	Dependency	Comments

2 Scheduling System Analysis

2.1 Scheduling Tool Analysis

2.1.1 Architectural scheme

[Provide a graphical depiction of the system components and how they logically interact across the system. Describe the function of each component.]

2.1.2 Ease of use

[Describe procedures and processes that the user is required to follow, and provide a summary of user feedback. Feedback should be in the form of surveys distributed to users to obtain their opinions about the ease of using the system.]

2.1.3 Data storage

[Give the location for document storage for files associated with the scheduling system solution.]

2.1.4 Computer/software accessibility

[Identify the accessibility of computers and scheduling software for the nursing staff. Also, identify the members of the nursing staff who require computer/software access.]

2.2 Competitive Overview

[Provide a competitive analysis of major scheduling systems. If the system used by your organization is not among the major scheduling systems, illustrate where your system fits within the industry.]

3 Areas for Improvement

3.1 Critical Problem Analysis

[List all critical problems that have been identified with the scheduling system. Solicit input for this section from each staff member.]

ID #	Description	Assigned to	Due date	Status	Comments

3.2 Best Practice Analysis

[List best practices in the industry for scheduling procedures. Include the file path or a link to the location of detailed information. Ensure that all information sources are listed.]

ID #	Description	Location

3.3 Recommendations

[List recommendations to improve the current scheduling system. Recommendations should be generated by end users and information systems support personnel in your organization.]

ID #	Description	Recommended by	Result

4 Sections Omitted

[List the section headings of any sections that you've intentionally omitted.]