

[Company Name]

**Optimized Nursing Scheduling Process**

**Prepared by**:

**Version Control**

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| Version | Date | Author | Change description |
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# Nursing Management

## Organization Chart

[Illustrate the reporting hierarchy for all individuals within your organization. Double-click the sample Microsoft Office Visio diagram below to make changes.]

## Communication Management

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

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 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 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] |

### Nurse contact information

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **E-mail** | **Phone** | **Specialty** | **Clinical team** |
|  |  |  |  |  |

## Resource Management

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Task #** | **Task name** | **Resource name** | **Dependency** | **Comments** |
|  |  |  |  |  |
|  |  |  |  |  |

## Schedule Management

[Identify timing considerations for scheduling nursing assignments. All related tasks for each nursing assignment should be listed chronologically, based on predecessors.]



### Employee availability restrictions

[Identify each of the items that affect scheduling of nursing resources.]

|  |  |  |
| --- | --- | --- |
| **Availability restriction** | **Assessment of restriction** | **Optimized procedure** |
| [Vacation/PTO request & approval process] | [Enter the information acquired from the assessment.] | [Enter the information that has been determined as the optimized procedure.] |
| [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] |  |  |

## Issue/Risk Management

[Identify a process for logging and managing all issues and risks that arise throughout a nursing assignment. All high-severity issues/risks deemed critical to the performance of nursing activities should be resolved accordingly and listed as lessons learned.]

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

## Workflow Diagram

[Provide a diagram that depicts the workflow for all nursing activities. Double-click the sample Visio diagram below to make changes.]



# Data Management

## Folder Structure

[Identify a folder structure in which to store all related electronic files.]

## File-Naming Convention

[Identify a formal naming convention for all files in the centralized folder structure.]

# Lessons Learned

[Identify potential opportunities for improving any of the work processes.]

|  |  |  |  |
| --- | --- | --- | --- |
| **ID #** | **Description** | **Submitted by** | **Result** |
|  |  |  |  |
|  |  |  |  |

# Sections Omitted

[List the section headers for any document sections that have been intentionally omitted.]