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[Company Name]

Optimized Nursing Scheduling Process

Prepared by:

Version Control

Version	Date	Author	Change description

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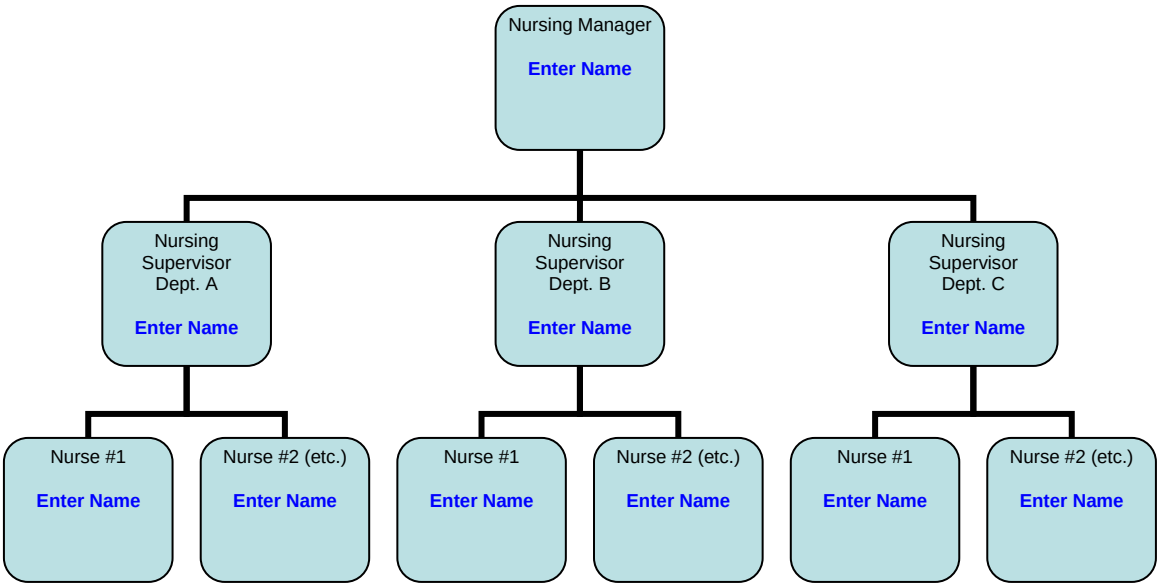
1 Nursing Management

1.1 Organization Chart

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



1.2 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]

1.2.1 Nurse contact information

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

Name	E-mail	Phone	Specialty	Clinical team

1.3 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

1.4 Schedule Management

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

Nursing scheduling spreadsheet

1.4.1 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]		

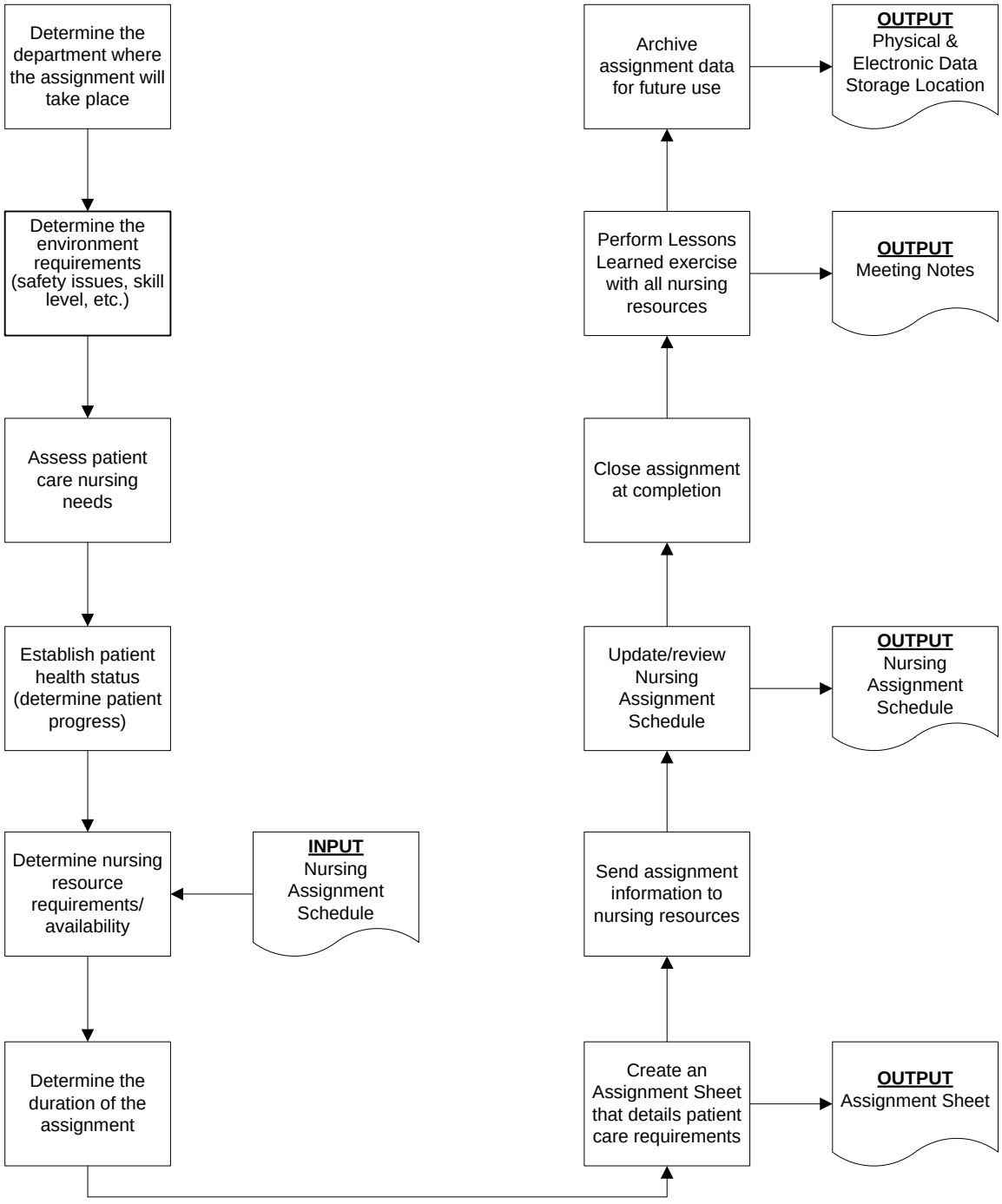
1.5 Issue/Risk Management

[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

1.6 Workflow Diagram

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



2 Data Management

2.1 Folder Structure

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

2.2 File-Naming Convention

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

3 Lessons Learned

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

ID #	Description	Submitted by	Result

4 Sections Omitted

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