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## *Clinical Workflow Assessment Outline*

### **Pre – Assessment**

- 1. Call with manager and/or management team**
- 2. Basic report request (Practice Activity Report/AR Aging, etc)**
- 3. On-site plan confirmation**

### **On-site Assessment**

- 1. Arrival meeting with manager, clinic tour and staff introductions**
- 2. Business operations process observations**
  - a. Scheduling**
  - b. Check-in**
  - c. Check-out**
  - d. Billing/coding**
  - e. A/R follow up**
- 3. Clinical operations process observations**
  - a. Provider appointment templates**
  - b. Patient flow**
  - c. Staff utilization**
  - d. Procedure/surgery scheduling**
  - e. Physician Assistant utilization**
- 4. Technology utilization**
  - a. Practice management system**
  - b. EMR system (if applicable)**
  - c. PACS**
- 5. Interact with staff during the observations as time permits (mindful to not interrupt time with patients)**
- 6. PSG will only enter the exam room if invited by the provider and cleared with the patient**
- 7. Additional report requests (if applicable)**
- 8. Summary meeting with manager and/or physician if time permits**



## Off-Site

1. **Productivity analysis and benchmarking**
2. **A/R analysis and benchmarking**
3. **Report writing with specific findings and recommendations**

## Post – Assessment

1. **Follow up call or on-site visit to review the finding in the report**
2. **Secondary call or on-site visit 30 days post assessment to provide any additional support for the recommendations outlined in the final report**
3. **On-going assistance via phone, email, etc.**



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