

# CREATION AND IMPLEMENTATION OF CHARTING TEMPLATES

## Introduction and Background

---

**Streamlined documentation is vital for high-quality patient care and reducing provider workload.** This project focuses on creating EMR-based charting templates to improve efficiency, reduce charting time, and enhance provider satisfaction.

## Objectives

---

- To reduce the average time spent on patient charting by 30%.
- To improve the consistency and accuracy of documentation across all providers.
- To enhance provider satisfaction by simplifying the charting process.

## Methodology Model for Improvement/PDSA cycle

---

- **Data Collection:** Assess current charting workflows for an individual provider and identify pain points.
- **Template Development:** Collaborate with provider(s) to design templates tailored for common visit types (e.g., annual check-ups, chronic disease management).
- **Pilot Implementation:** Test the templates for a small number of visits for a limited number of weeks (e.g. two weeks), collect data, and refine as needed.
- **Wider Rollout:** Implement the finalized templates for all visits of one provider (or across all clinic providers).

## Implementation Process

---

### Phase 1

- **Step 1- Workflow Evaluation:** Conduct a workflow analysis and provider survey to identify documentation challenges.
- **Step 2 -Chart Template Development:** Develop initial charting templates in the EMR system, with input from provider(s) and administrative staff.
- **Step 3- Pilot:** Pilot the templates with select provider(s), incorporating their feedback to refine the templates.

## Phase 2

- **Step 4- Refinement and Clinic Wide Roll Out:** Refine templates based on feedback from pilot. Provide training and support for all providers as the pilot is expanded to all clinic providers during the clinic-wide implementation of the templates.
- **Step 5- Ongoing Improvements:** Monitor and evaluate the impact of the new templates on charting efficiency and provider satisfaction.

## Anticipated Time Needed

---

- Approximately 14-18 hours

## Highlights of Outcomes (To be filled by NP)

---

### **\*Example outcomes:**

- *Preliminary data from the pilot phase showed a reduction of ~70% in charting time for participating providers.*
- *Provider satisfaction was also increased and after work administrative work was significantly reduced*

## Impact and Sustainability (To be filled by NP)

---

**\*Example:** *The implementation of charting templates reduced documentation time, enabling providers to focus on patient care. Regular updates will sustain improvements and ensure adherence to clinical guidelines. Additionally, templates enhance provider satisfaction by promoting thorough and consistent patient evaluations.*