TENNESSEE CHARITABLE CARE NETWORK

TCCN EHR Best Practices Scaling Recommendations

This guide outlines a structured approach to standardizing, piloting, and scaling EHR-based best practices across the charitable care setting to improve care quality, efficiency, and consistency. It provides a repeatable framework for identifying workflow gaps, aligning with clinical guidelines, and implementing system-wide improvements to drive excellent patient care.

1. Define the Workflow

Clearly define the specific clinical or operational workflow to evaluate. This can be generated by grant requirements, updated clinical guidelines, identified care gaps, or other needs addressed.

- Identify the why the workflow is being prioritized (i.e. grant requirement, health disparity impact, staffing shortage)
- Specify the target population, care setting, and event type (i.e. patient intake, annual physical, behavioral health evaluation)
- Define success criteria (clinical outcome, efficiency, compliance metric, etc.)

2. Map the Current State

Document how the workflow is currently performed step-by-step, including who does what and where in the EHR it occurs. Identify roles and handoffs, decision points, pain points (delays, duplication, errors), workarounds, and areas of insufficiencies.

3. Identify Stakeholders

Engage all roles involved (front desk, MA, nurses, clinicians, wrap around, admin staff, etc.) to understand perspectives and responsibilities. Define roles and responsibilities as well as decision-making authority.

4. Collect Baseline Data

Review current performance using available metrics (e.g., documentation completeness, screening rates, error rates, turnaround times) through EHR reporting dashboards, manual chart audits and patient registries. Define baseline metrics and post-pilot goals.

5. Identify Gaps and Variability

Compare current workflow vs. evidence-based guidelines or best practices to identify inconsistencies, inefficiencies, or missing steps. Specify if any performance variation across sites or users, redundant steps, or missed opportunities. Identify patient and stakeholder needs to improve efficient, high quality deliverable care. Prioritize gaps based on impact and feasibility.

6. Identify EHR System Capabilities

Inventory available EHR tools such as clinical decision support (CDS), templates, order sets, alerts/reminders, and reporting dashboards. Engage EHR vendor or IT resources to identify existing tools that can be utilized. Document system limitations and constraints.

7. Define the Desired ("Standardized") Workflow

Create a clear, step-by-step workflow with defined roles, timing, and documentation requirements. Consider a standard form that can be used across all workflows with clearly defined exceptions if necessary to minimize variation.

8. Align with Guidelines & Best Practices

Ensure the standardized workflow reflects clinical guidelines (e.g., proper BP measurement technique, ASCVD risk use) and maximizes EHR capabilities. Map workflows to clinical guidelines and best practice resources (i.e. USPSTF recommendations).

9. Build Supporting Tools

Develop templates, checklists, documentation fields (smart phrases, order sets), and quick-reference guides to support the workflow. Build reporting dashboards to support ongoing evaluation and process improvement. Ensure tools are user tested before rollout.

10. Train Staff and Pilot the Workflow

Provide role-based training, then test the workflow in a pilot phase (with defined start/end dates and feedback channels) with a small group or subset of patients. Track training completion rates and early adoption metrics.

11. Monitor, Evaluate, and Refine

Implement the standardized workflow and continuously monitor workflow adherence, patient outcomes, and documentation efficiency. Establish staff (and patient, if applicable) feedback channels as well as a regular review cadence for ongoing workflow refinement based on data, feedback, and EHR system updates. Clearly define ownership for data review and decision-making.

12. Sustainability Plan

Establish a sustainability plan to ensure long-term adherence and impact of the standardized workflow. Standardize onboarding and training for new staff, ongoing refresher trainings, and embed workflow metrics into regular reporting structures to support accountability and continuous improvement.