

Workflow	Phase	Task	Action
<u><i>Patient centric</i></u>			
Outpatient encounter			
	Intake and Nurse assessment	Check in	Document
		Measure, record vital signs	Document
		Med review	Review
		Handoff	Notify
	Clinician* assessment	Review charts	Review
		Interview patient	Perform
		Take history	Document
		Diagnose and plan	Perform
		Review prior test results	
		Order lab test	Order
		Prescribe	Order
		Make a referral	Order
		Treatment	Perform
		Patient counseling	Perform
	Check out	Give out instructions	Document
		Schedule next appointment	Create
Emergency room encounter			

Workflow	Phase	Task	Action
	Patient arrival for emergency care (High intensity care)	Inform ambulance	Notify
		Measure, record vital signs	Document
		Handoff	Document
		Interview patient	Perform
		Take history	Document
	Patient arrival for unscheduled urgent care /Safety net care (Low intensity care)	Interview patient	Perform
		Take history	Document
		Referral	Order
		Document transfer	Transmit
	ED treatment (Clinician assessment)	Review of referral	Review
		Order lab tests	Order
		Diagnosis	Document
		Prescribe	Review, Order
	Patient disposition (Medical assistant)	Disposition patients	Perform

Workflow	Phase	Task	Action
(Ambulatory) surgical procedure			
	Pre-operative phase	Registration	Document
		Measure, record vital signs	Document
		Match patient to procedure	Perform
		Nursing preop assessment/exam	Order, Perform
		Premedication	Order
		Transport to OR area	Notify
		Handoff	Notify
	Operating room phase (Surgeon, anesthesiologist, nurses)	Set up instruments & devices	Perform
		Identify patient	Acknowledge
		Anesthesia procedures	Perform
		Operate	Perform
		Create surgical record	Create
		Write orders	Order
		Handoff	Notify
	Postop Period (Medical assistant)	Transport to recovery area	Notify

Workflow	Phase	Task	Action
		Post-op labs/tests	Order
		Pain management	Perform
		Discharge from recovery area	Create
Inpatient hospitalization			
Inpatient surgical procedure	See ambulatory surgical procedure		
<u>Message centric</u>			
Patient request for appointment			
Emergency room information flow			
Pharmacy message handling, patient request for renewal			
Messaging with other clinicians			
Preop phase of surgery			
Scheduling procedures			
<u>Population management</u>			
Clinician review of feedback report			
		Review report	Review
		Track	Review
		Analyze & Stratify	Perform
		Report	Report

Workflow	Phase	Task	Action
		Alert	Alert
		Educate patients	Recommend
		Follow up	Notify
		Contact patient (may include order, ask patient to come in for appointment)	Perform
Case management session			
	Case finding	Review report to identify potential eligible people	Review
		Screen	Perform
		Registration	Document
	Assessment	Interview clients	Perform
		Determine needs	Document
	Goal setting and service planning	Collaborative decision making with patients	Document
		Expert consultation support	Transmit
		Guidelines institutionalization and prompts	Perform
		Provider Education	Perform
	Care plan implementation	Educate patient	Perform
		Patient activation/psychological support	Perform
		Guidelines available to patients	Notify

Workflow	Phase	Task	Action
		Implement the plans	Remind
	Monitoring and evaluation	Reviewing services delivered	Review
		Feedback of performance data	Review

Sub-action(s)	Actor(s)	Alerts/ Reminders
1.16 (Access patient demographic data), 7.6 (Document date of birth), 7.9-12 (Document ethnicity, gender, growth chart, height), 7.14 (Document insurance type), 7.25 (Document preferred language), 7.28 (Document race), 7.34(Document smoking status), 7.8(Document encounter)	Registration Clerk	x
7.40(document vital signs); 7.41(document weight)	Medical Assistant; Nursing	x
1.10-12(Access mediation allergy history, medication history, active medication list)	Medical Assistant; Nursing	
2.2(acknowledge receipt of clinical summary), 19.5(transmit clinical summary), 12.13(receive patient summary allergy record from other providers)	Medical Assistant; Nursing; Physician	
1.1-28 (Access - all information in medical record) 17.13 (Review quality measure results)	Physician	
	Physician; Nursing; Medical Assistant	x
7.1(Document a progress note for each encounter)	Physician; Nursing; Medical Assistant	
	Physician	
17.1-2(review all information for a lab test report, clinical lab tests received with LOINC codes)		
10.4(order lab study)	Physician	x
10.1(Order medication), 10.5-7 (Order medication generic-, new), 19.6 (transmit prescription)	Physician	x
10.10 (Order provider referral)	Physician	
	Physician; Nursing	
	Physician; Nursing	x
2.1(Acknowledge education receipt)	Medical Assistant; Nursing	x
15.1-2 (Remind patient per patient preference for follow-up, preventive care)	Registration Clerk	

Sub-action(s)	Actor(s)	Alerts/ Reminders
12.13(Receive patient summary record from other providers), 2.2(Acknowledge receipt of clinical summary), 19.5(Transmit clinical summary)	Nursing	
7.40(document vital signs); 7.41(document weight)	EMS paramedics	x
7.1(Document a progress note for each encounter)	Nursing	
	Physician; Nursing	x
7.1(Document a progress note for each encounter)	Physician	
	Physician; Nursing	x
7.1(Document a progress note for each encounter)	Physician	
10.10(Order provider referral)	Physician	
12.13(Receive patient summary record from other providers), 2.2(Acknowledge receipt of clinical summary), 19.5(Transmit clinical summary)	Nursing; Medical Assistant	
2.2(Acknowledge receipt of clinical summary)	Physician; Nursing	x
10.4(Order lab study), 10.2(diagnostic imaging procedure), 10.8(procedure), 12.2(Receive clinical lab test result), 17.2(Review clinical lab tests received with LOINC codes), 20.13(Update patients record based on lab test result)	Physician	x
7.1(Document a progress note for each encounter)	Physician	
10.5-7(Order medication), 13.1(Recommend care modifications based on clinical decision support rules), 19.6 (Transmit electronic permissible medication order (prescription))	Physician	x
9.1-2(Notify patients for follow-up care and preventive care), 10.10(Order provider referral)	Nursing; Medical Assistant	

Sub-action(s)	Actor(s)	Alerts/ Reminders
1.16(Access patient demographic data), 7.6(Document date of birth), 7.9-12(Document ethnicity, gender, growth chart), 7.14(Document insurance type), 7.25(Document preferred language), 7.28(Document race), 7.34(Document smoking status)	Registration Clerk	
7.40(Document vital signs); 7.41(Document weight)	Medical Assistant; Nursing	x
	Medical Assistant; Nursing; Physician	
	Nursing; Medical Assistant	x
10.5-7(Order medication), 13.1(Recommend care modications based on clinical decision support rules), 17.9(Review education provided)	Physician	x
	Nursing; Medical Assistant	
2.2(Acknowledge receipt of clinical summary), 19.5(Transmit clinical summary), 12.13(receive patient summary allergy record from other providers)	Nursing; Medical Assistant	
7.1(Document a progress note for each encounter)	Physician	x
10.1-10(Order--all types)	Physician	x
12.13(Receive patient summary record from other providers), 2.2(Acknowledge receipt of clinical summary), 19.5(Transmit clinical summary)	Nursing; Medical Assistant	

Sub-action(s)	Actor(s)	Alerts/ Reminders
10.4(Order lab study), 10.8(Order order set), 10.9(Order procedure)		x
		x
9.1-2(Notify patient for follow-up care and preventive care), 10.10(Order provider referral), 2.1(Acknowledge education receipt)	Medical Assistant; Nursing; Physician	
17.5-13(Review displayed changes in diastolic blood pressure, height, systolic blood pressure, weight, education provided, electronically formulary or preferred drug list, lab results electronically in human readable format, lab results incorporated as codified data, quality measure results)	Physician, Nursing, Medical Assistant	x
	Physician, Nursing, Medical Assistant	x
18.1-5(Stratify notifications by patient preference, patients by condition, reports by demographic information, by provider type, by provider role)	Physician, Nursing, Medical Assistant	x
17.13(Reivew quality measure results)	Physician, Nursing, Medical Assistant	x

Sub-action(s)	Actor(s)	Alerts/ Reminders
13.1(Recommend care modifications based on clinical decision support rules)	Physician, Nursing, Medical Assistant	x
	Physician, Nursing, Medical Assistant	x
9.1-2(Notify patients for follow-up care and preventive care)	Physician, Nursing, Medical Assistant	
	Physician, Nursing, Medical Assistant	
17.13(Review quality measure results)	Physician, Nursing, Medical Assistant	
	Physician, Nursing, Medical Assistant	
7.26(Document problem on problem list)	Physician, Nursing, Medical Assistant	
	Physician, Nursing, Medical Assistant	
7.24(Document performance result)	Physician, Nursing, Medical Assistant	
7.22(Document patient preference)	Physician, Nursing, Medical Assistant	
19.5(Transmit clinical summary)	Physician, Nursing, Medical Assistant	
7.2(Document advanced directive), 7.3(Document alert provided to clients)	Physician, Nursing, Medical Assistant	
	Physician, Nursing, Medical Assistant	
	Physician, Nursing, Medical Assistant	
	Physician, Nursing, Medical Assistant	
9.1-2(Notify patients for follow-up care and preventive care)	Physician, Nursing, Medical Assistant	

Sub-action(s)	Actor(s)	Alerts/ Reminders
15.1-2(Remind patients per patient preference for follow up care and preventive care)	Physician, Nursing, Medical Assistant	x
17.9(Review education provided) 17.13(Review quality measure results)	Physician, Nursing, Medical Assistant	
17.5-13(Review displayed changes in diastolic blood pressure, height, systolic blood pressure, weight, education provided, electronically formulary or preferred drug list, lab results electronically in human readable format, lab results incorporated as codified data, quality measure results)	Physician, Nursing, Medical Assistant	x

Order sets	Info Buttons	Data display	Documentation templates
			X
			X
		X	
X			X
		X	
			X
			X
	X		X
			X
X	X	X	X
X	X	X	X
X			X
			X
		X	X

Order sets	Info Buttons	Data display	Documentation templates
			X
			X
X			X
			X
			X
			X
			X
X			X
		X	X
X	X	X	X
X	X	X	X
X			X

Order sets	Info Buttons	Data display	Documentation templates
			X
		X	X
		X	X
X	X	X	X
X			X
	X	X	X
X	X	X	X
X			X

Order sets	Info Buttons	Data display	Documentation templates
		X	
X	X	X	X
	X	X	X
	X	X	X
	X	X	X
	X	X	X

Order sets	Info Buttons	Data display	Documentation templates
		X	X
	X	X	X
			X
			X
X			
			X
			X
			X
			X
		X	X

Order sets	Info Buttons	Data display	Documentation templates
		x	
		x	
	x	x	x