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# IDENTIFYING OPPORTUNITIES FOR IMPROVEMENT AND DEFINING NEW WORKFLOW

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*Identify opportunities to improve your current workflow through incorporation of best practices and integration of a family history tool.*

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While thinking through your current and future workflows as well as best practices and examples from other clinics, you should be able to identify potential improvements to your process. Develop a new or updated workflow that will help achieve your practice's goals for using family history.

## **PARTICIPANTS**

Implementation lead, staff involved in family history processes

## **WHAT YOU'LL NEED**

Understanding of existing workflow

## **BARRIERS**

Competing priorities, staff, time, infrastructure

## **PATIENT MATERIALS**

[Patient Education Materials](#)

## **STEPS**

- 1** Identify the points where delays and waste occur. Perhaps some current steps can be eliminated, such as gathering data that is never used, duplicating forms, repeating questions for patients, and storing paperwork unnecessarily.
- 2** Identify all the steps that you want to change with a new family history system.
- 3** Define a new family history workflow and summarize it in a new workflow diagram. Note the differences between your current and future workflows. You will refer to the proposed workflow as you select and implement your new system.
- 4** Depending on the scope of your planned changes, you may need to identify additional resources for the initial infrastructure development and/or supporting the process over time. Some practices have been successful in applying for small grants or tying cancer family history collection to institution-wide financial metrics to obtain funding.
- 5** Plan the change from the current system to the new one. Identify where the workflow changes occur and whether there are any intermediate transitional changes, as well as the time sequence of changes.
- 6** Review the proposed new system, particularly changes and new assignments, with management and all concerned parties to ensure that all issues have been resolved, to gain consensus on key decisions, and to ensure readiness to implement.

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# IDEAS FOR IMPROVING YOUR WORKFLOW

*Consider the following steps that have been helpful for other practices.*

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- Have the patient collect family history information before the provider visit, and/or identify another team member such as a nurse or medical assistant who can help collect this information. Collecting this information prior to the visit allows the patients to research their family history more completely and provide more accurate information.
- Identify time for a team member to review the patient's provided family history and clarify any information, as needed.
- Provide patient education before and/or during family history collection, at the appropriate literacy level and in the patient's preferred language, to help the patient understand why it is important to share family health history with the provider and how to learn more about the family history. See [page 39](#) and the Appendix for suggested patient materials.
- Use a tool to aid in standardized family history collection and/or risk assessment.
- Document family history in the medical record consistently across the practice.