Measure the impact of the collaborative

documentation process

Measure the impact of the collaborative documentation process using the measurement tools provided below. Each is designed with a quality improvement framework that will allow you to see positive changes in your operational efficiency.

Consider (1) selecting one or two measurement tools, (2) monitoring each regularly and (3) sharing progress reports with staff during team meetings or huddles. Keep in mind that data collection can be completed by any member of the team who is involved in the improvement efforts.

**Measurement tools:**

[Measurement tool 1: Clinician administrative work time 2](#_Toc401308708)

[Measurement tool 2: Clinician productivity 4](#_Toc401308709)

[Measurement tool 3: Clinician experience survey 6](#_Toc401308710)

[Measurement tool 4: Patient experience survey 9](#_Toc401308711)

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Measurement tool 1: Clinician administrative work time

**Step 1: Track time spent documenting patient care and performing administrative tasks**

*Purpose****:*** *This log will measure the change in clinician time spent on administrative tasks, such as finishing notes and calling patients or pharmacies, during a clinic day before and after implementation of the collaborative documentation process.*

*Instructions: Each clinician (e.g., MD, NP or PA) in the practice can complete this tracking log at three time points: (1) at least one week before starting the new collaborative documentation process, which will serve as baseline data; (2) 12 weeks after implementation; and (3) 24 weeks after implementation. The tracking log accounts for five clinic days. If the clinician works fewer than that or is unable to complete the tool for each day, simply tally when possible.*

*Please track the number of hours spent on documenting patient care and administrative tasks that could be shared with a team member, such as computerized order entry or electronic billing each day. The tasks tracked will depend on the practice’s newly designed collaborative care mode and can be modified to meet your needs. The shaded gray cells have been included to guide you in transferring data through this multi-step tool and determining the value of your first time point.*

|  |  |  |
| --- | --- | --- |
| Clinician name: | | |
| **Clinic week:** | **Time spent documenting patient care and performing administrative tasks** | **Total # of hours** |
| Day 1: |  |  |
| Day 2: |  |  |
| Day 3: |  |  |
| Day 4: |  |  |
| Day 5: |  |  |
|  | Add daily totals to determine total number of hours per clinic week (numerator) |  |
| Number of days completed per clinic week (denominator) |  |
| Average time spent on administrative tasks by the clinician (numerator divided by denominator)  **Data to include in Step 2** 🡪 |  |

**Step 2: Determine practice average amount of time spent documenting patient care and performing administrative tasks**

*Instructions: Determine the average amount of time spent documenting patient care for all clinicians during the same week. Populate the chart below with individual clinician data calculated in Step 1. The numerator is the total time spent documenting patient care and completing administrative tasks for all clinicians who submitted data from Step 1. The denominator is the total number of clinicians who submitted data from Step 1.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Participating clinicians** | **Week 0**  **(Pre-implementation)** | **Week 12**  **(Post-implementation)** | **Week 24**  **(Post-implementation)** |
| Clinician 1: |  |  |  |
| Clinician 2: |  |  |  |
| Clinician 3: |  |  |  |
| … |  |  |  |
| Clinician 10 |  |  |  |
| Total time spent on administrative tasks for all clinicians (numerator) |  |  |  |
| Total number of clinicians included (denominator) |  |  |  |
| Average time spent on administrative tasks for all clinicians in the practice (numerator divided by denominator)  **Data to include in Step 3 🡪** |  |  |  |

**Step 3: Graph your results**

*Instructions: Use a charting tool to graph the average time spent documenting patient care and performing administrative tasks before and after implementation. Your graph might look like the run chart below. Use this to discuss how you can improve the process with your team.*

Start of collaborative documentation

Measurement tool 2: Clinician productivity

**Step 1: Track the number of patients seen per day**

*Purpose****:*** *This log will measure the change in patient visits per care session before and after implementation of the collaborative documentation process.*

*Instructions: Each clinician (e.g., MD, NP or PA) in the practice should complete this tracking log at three time points: (1) at least one week before starting the new collaborative documentation process, which will serve as baseline data; (2) 12 weeks after implementation; and (3) 24 weeks after implementation. The tracking log accounts for five clinic days. If the clinician works fewer than that or is unable to complete the tool for each day, simply tally when possible. The tool can also be modified to fit your practice. If half-day sessions make more sense for the practice to track, consider each session as one half day instead of one full day.*

*Please track the number of patients seen during a clinic week. Your total number of patients should be the sum of all patients seen during that day. The shaded gray cells have been included to guide you in transferring data through this multi-step tool and determining the value of your first time point.*

|  |  |  |
| --- | --- | --- |
| Clinician name: | | |
| **Clinic week:** | | **Total # of patients seen** |
| Day 1: | |  |
| Day 2: | |  |
| Day 3: | |  |
| Day 4: | |  |
| Day 5: | |  |
|  | Add daily totals to determine the total number of patients seen per clinic week (numerator) |  |
| Number of days completed per clinic week (denominator) |  |
| Average number of patients seen by the clinician (numerator divided by denominator)  **Data to include in Step 2**  🡪 |  |

**Step 2: Determine the number of patients seen in the practice per day**

*Instructions: Determine the average number of patients seen by all clinicians during the same week. Populate the chart below with individual clinician data calculated in Step 1. The numerator is the total number of patients seen by all clinicians who submitted data from Step 1. The denominator is the total number of clinicians who submitted data from Step 1.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Participating clinicians** | **Week 0**  **(Pre-implementation)** | **Week 12**  **(Post-implementation)** | **Week 24**  **(Post-implementation)** |
| Clinician 1: |  |  |  |
| Clinician 2: |  |  |  |
| Clinician 3: |  |  |  |
| … |  |  |  |
| Clinician 10 |  |  |  |
| Total number of patients seen by all clinicians (numerator) |  |  |  |
| Total number of clinicians included (denominator) |  |  |  |
| Average number of patients seen by all clinicians in the practice (numerator divided by denominator)  **Data to include in Step 3 🡪** |  |  |  |

**Step 3: Graph your results**

*Instructions: Use a charting tool to graph the average number of patients seen per clinic day before and after implementation. Your graph might look like the run chart below. Use this to discuss how you can improve the process with your team.*

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40

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# 

# Measurement tool 3: Clinician experience survey

**Step 1: Survey clinicians**

*Purpose:**The purpose of this survey is to measure clinician satisfaction and understand the clinician experience as it relates to the collaborative documentation process.*

*Instructions: Each clinician (e.g., MD, NP or PA) in the practice could complete this survey at three time points: (1) at least one week before starting the new collaborative documentation process, which will serve as baseline data; (2) 12 weeks after implementation; and (3) 24 weeks after implementation. Complete this survey to identify opportunities for performance improvement.*

*The shaded gray cells have been included to guide you in transferring data through this multi-step tool and determining the value of your first time point.*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Clinician Survey** | | | | | | |
| Clinician name: | | | Date of Survey: | | | |
| Did a staff member work with you during today’s clinic session to assist with documentation , laboratory order entries or prescription processing? ⬜Yes ⬜No | | | | | | |
| *Thinking about today’s clinic session, how much do you agree or disagree with the following statements? Please circle your answer.* | | | | | | |
| 1. I was able to provide the patient care needed without feeling rushed. | 1 Strongly disagree | 2 Disagree | | 3 Neutral | 4 Agree | 5 Strongly agree |
| 2. I left the exam room feeling satisfied with the encounter. | 1 Strongly disagree | 2 Disagree | | 3 Neutral | 4 Agree | 5 Strongly agree |
| 3. I left the exam room feeling that majority of work for the encounter would be completed by the end of the patient visit. | 1 Strongly disagree | 2 Disagree | | 3 Neutral | 4 Agree | 5 Strongly agree |
| 4. I was able to give my patients my full attention. | 1 Strongly disagree | 2 Disagree | | 3 Neutral | 4 Agree | 5 Strongly agree |
| 5. Overall, I was able to stay on schedule for this care session. | 1 Strongly disagree | 2 Disagree | | 3 Neutral | 4 Agree | 5 Strongly agree |
| *Answer the following only after the collaborative documentation process has been implemented.* | | | | | | |
| What do you like most about the collaborative documentation process?  How could we improve the collaborative documentation process? | | | | | | |

**Step 2: Calculate the professional satisfaction score for each clinician in the practice**

*Instructions: Transfer the numeric responses from the survey in Step 1 (questions 1-5) to the table below then calculate the average survey score for each clinician. The numerator is the sum of survey response values. The denominator is the total number of questions answered on the survey.*

*Open-ended questions on the survey are not included in the numeric scoring. You may wish to list all of these comments for your clinic leadership or care team to review when they look at the survey results. These could help focus continued quality improvement efforts as the team adopts the new process.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Participating clinicians** | **Week 0**  **(Pre-implementation)** | **Week 12**  **(Post-implementation)** | **Week 24**  **(Post-implementation)** |
| Question 1 |  |  |  |
| Question 2 |  |  |  |
| Question 3 |  |  |  |
| Question 4 |  |  |  |
| Question 5 |  |  |  |
| Add survey response values (numerator) |  |  |  |
| Total number of questions answered (denominator) |  |  |  |
| Determine clinician professional satisfaction score (numerator divided by denominator)  **Data to include in Step 3 🡪** |  |  |  |

**Step 3: Calculate the professional satisfaction score for all clinicians in the practice**

*Instructions: Determine the average professional satisfaction score for all clinicians in the practice. Populate the chart below with individual clinician data calculated in Step 2. The numerator is the sum of the average scores for all submitted clinician surveys. The denominator is the total number of clinicians to complete a survey.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Participating clinicians** | **Week 0**  **(Pre-implementation)** | **Week 12**  **(Post-implementation)** | **Week 24**  **(Post-implementation)** |
| Clinician 1: |  |  |  |
| Clinician 2: |  |  |  |
| Clinician 3: |  |  |  |
| … |  |  |  |
| Clinician 10 |  |  |  |
| Add clinician professional satisfaction scores (numerator) |  |  |  |
| Total number of clinicians included (denominator) |  |  |  |
| Calculate practice professional satisfaction scores (numerator divided by denominator)  **Data to include in Step 4 🡪** |  |  |  |

**Step 4: Graph your results**

*Instructions:* *Use a charting tool to graph the professional satisfaction score for your practice before and after implementation. Your graph might look like the run chart below. Use this to discuss how you can improve the process with your team.*

Start of collaborative documentation

# Measurement tool 4: Patient experience survey

**Step 1: Survey your patients**

*Purpose:**The purpose of this survey is to measure patient satisfaction and understand the patient experience as it relates to the collaborative documentation process.*

*Instructions: Measure the patient experience before and after implementation by distributing this survey to patients at three time points: (1) at least one week before starting the new collaborative documentation process, which will serve as baseline data; (2) 12 weeks after implementation; and (3) 24 weeks after implementation. Use the same day of the week each time you distribute surveys. Ask a member of the team to issue the survey to every patient* ***after*** *their visit with the provider and identify a place for patients to anonymously submit completed surveys. Aim to collect 30 survey responses. Use survey results to identify opportunities for performance improvement.*

*The shaded gray cells have been included to guide you in transferring data through this multi-step tool and determining the value of your first time point.*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Patient Survey** | | | | | | |
| Survey number: | | | Date of Survey: | | | |
| During this visit, did someone stay in the exam room with you and the doctor and took notes on the computer?  ⬜Yes ⬜No | | | | | | |
| *How much do you agree or disagree with the following statements? Please circle your answer.* | | | | | | |
| 1. I feel good about my medical visit. | 1 Strongly disagree | 2 Disagree | | 3 Neutral | 4 Agree | 5 Strongly agree |
| 2. My doctor or provider gave me his/her full attention. | 1 Strongly disagree | 2 Disagree | | 3 Neutral | 4 Agree | 5 Strongly agree |
| 3. I was able to say everything I wanted to say to my doctor or provider. | 1 Strongly disagree | 2 Disagree | | 3 Neutral | 4 Agree | 5 Strongly agree |
| 4. I understand the care recommendations that my doctor or provider gave me today. | 1 Strongly disagree | 2 Disagree | | 3 Neutral | 4 Agree | 5 Strongly agree |

**Step 2: Calculate a satisfaction score for each patient**

*Instructions: Transfer the numeric responses from the survey in Step 1 (questions 1-4) to the table below then calculate the average survey score for each patient. The numerator is the sum of survey response values. The denominator is the total number of questions answered on the survey.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Survey number:** | **Week 0**  **(Pre-implementation)** | **Week 12**  **(Post-implementation)** | **Week 24**  **(Post-implementation)** |
| Question 1 |  |  |  |
| Question 2 |  |  |  |
| Question 3 |  |  |  |
| Question 4 |  |  |  |
| Add survey response values (numerator) |  |  |  |
| Total number of questions answered (denominator) |  |  |  |
| Determine patient satisfaction score (numerator divided by denominator)  **Data to include in Step 3 🡪** |  |  |  |

**Step 3: Calculate the practice patient satisfaction score**

*Instructions: Determine the average satisfaction score for all patients in the practice. Populate the chart below with individual patient data calculated in Step 2. The numerator is the sum of the average scores for all submitted patient surveys. The denominator is the total number of patients to complete a survey.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Participating patients** | **Week 0**  **(Pre-implementation)** | **Week 12**  **(Post-implementation)** | **Week 24**  **(Post-implementation)** |
| Survey number: 1 |  |  |  |
| Survey number: 2 |  |  |  |
| Survey number: 3 |  |  |  |
| … |  |  |  |
| Survey number: 30 |  |  |  |
| Add patient satisfaction scores (numerator) |  |  |  |
| Total number of patients included (denominator) |  |  |  |
| Calculate patient satisfaction scores (numerator divided by denominator)  **Data to include in Step 4 🡪** |  |  |  |

**Step 4: Graph your results**

*Instructions:* *Use a charting tool to graph the patient satisfaction score for your practice before and after implementation. Your graph might look like the run chart below. Use this to discuss how you can improve the process with your team.*

Start of collaborative documentation

# Measurement tool 5: Staff experience survey

**Step 1: Survey your staff**

*Purpose:**The purpose of this survey is to measure professional satisfaction and understand the staff experience as it relates to collaborative documentation.*

*Instructions: Each staff member in the practice should complete this survey at three time points: (1) at least one week before starting the new collaborative documentation process, which will serve as baseline data; (2) 12 weeks after implementation; and (3) 24 weeks after implementation. Complete this survey to identify opportunities for performance improvement.*

*The shaded gray cells have been included to guide you in transferring data through this multi-step tool and determining the value of your first time point.*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Staff Survey** | | | | | | |
| Staff name (optional): | | | Date of Survey: | | | |
| *How much do you agree or disagree with the following statements? Please circle your answer.* | | | | | | |
| 1. I feel that the work that I do improves the quality of patient care. | 1 Strongly disagree | 2 Disagree | | 3 Neutral | 4 Agree | 5 Strongly agree |
| 2. My professional skills are used to the fullest at this clinic. | 1 Strongly disagree | 2 Disagree | | 3 Neutral | 4 Agree | 5 Strongly agree |
| 3. The tasks that I am asked to do each day are manageable. | 1 Strongly disagree | 2 Disagree | | 3 Neutral | 4 Agree | 5 Strongly agree |
| 4. Before the visit, I am able to exchange pertinent information about the patient with providers. | 1 Strongly disagree | 2 Disagree | | 3 Neutral | 4 Agree | 5 Strongly agree |
| 5. People at all levels of our clinic give feedback to improve the way we do things. | 1 Strongly disagree | 2 Disagree | | 3 Neutral | 4 Agree | 5 Strongly agree |
| *Answer the following only after the collaborative documentation process has been implemented.* | | | | | | |
| What do you like most about the collaborative documentation process?  How could we improve the collaborative documentation process? | | | | | | |

**Step 2: Calculate the professional satisfaction score for each staff member in the practice**

*Instructions: Transfer the numeric responses from the survey in Step 1 (questions 1-5) to the table below then calculate the average survey score for each staff member. The numerator is the sum of survey response values. The denominator is the total number of questions answered on the survey.*

*Open-ended questions on the survey are not included in the numeric scoring. You may wish to list all of these comments for your clinic leadership or care team to review when they look at the survey results. These could help focus continued quality improvement efforts as the team adopts the new process.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Staff name (if provided):** | **Week 0**  **(Pre-implementation)** | **Week 12**  **(Post-implementation)** | **Week 24**  **(Post-implementation)** |
| Question 1 |  |  |  |
| Question 2 |  |  |  |
| Question 3 |  |  |  |
| Question 4 |  |  |  |
| Question 5 |  |  |  |
| Add survey response values (numerator) |  |  |  |
| Total number of questions answered (denominator) |  |  |  |
| Calculate staff member professional satisfaction score (numerator divided by denominator)  **Data to include in Step 3 🡪** |  |  |  |

**Step 3: Calculate the professional satisfaction score for all staff in the practice**

*Instructions: Determine the average professional satisfaction score for all staff members in the practice. Populate the chart below with individual staff data calculated in Step 2. The numerator is the sum of the average scores for all submitted staff professional satisfaction surveys. The denominator is the total number of staff to complete a survey.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Participating staff** | **Week 0**  **(Pre-implementation)** | **Week 12**  **(Post-implementation)** | **Week 24**  **(Post-implementation)** |
| Staff 1: |  |  |  |
| Staff 2: |  |  |  |
| Staff 3: |  |  |  |
| … |  |  |  |
| Staff10 |  |  |  |
| Add staff professional satisfaction scores (numerator) |  |  |  |
| Total number of staff members included (denominator) |  |  |  |
| Calculate staff professional satisfaction scores (numerator divided by denominator)  **Data to include in Step 4 🡪** |  |  |  |

**Step 4: Graph your results**

*Instructions:* *Use a charting tool to graph the professional satisfaction score for your practice before and after implementation of the collaborative documentation process. Your graph might look like the run chart below. Use this to discuss how you can improve the process with your team.*

Start of collaborative documentation

# Additional Information

**What else should you measure?**

The collaborative documentation process can help increase productivity and capacity to care for more patients. You may choose to track your productivity (e.g., visits per half day session) and/or relative value units (RVUs) using your practice management system. Sharing positive results is an opportunity to showcase your success.

For additional information on how to implement quality improvement strategies in your practice, contact the AMA at [StepsForward@ama-assn.org](mailto:StepsForward@ama-assn.org).

**Sources for scales**

Dube K, Willard-Grace R, Bodenheimer T. Team documentation and scribing evaluation toolkit. Available at cepc.ucsf.edu. Accessed October 21, 2015.

Probst JC, Greenhouse DL, Selassie AW. Patient and physician satisfaction with an outpatient care visit. J Fam Pract. 1997 Nov;45(5):418-25.